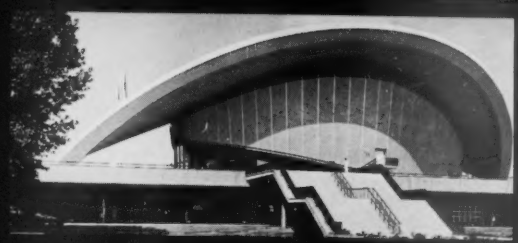
Trade and Industry

7 April 1978 Every Friday 40p

Trade and Industry market report

West Berlin where East meets West



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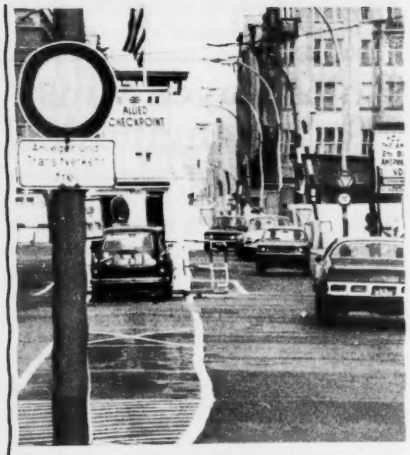
Trade and Industry

7 April 1978

News from the Departments of Industry·Trade·Prices & Consumer Protection



The quadripartite agreement of 1971 *has brought new stability to West Berlin* and UK exporters could profit from establishing a larger stake in the profitable market (page 16)

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This week

White paper on nationalised industries 2
Government backs BL plans 2
England's major roads – £300m a year 2
Rolls-Royce wins PanAm engine deal 2
Small firms' scheme extended 2
Official reserves 2
Air noise complaints – new procedures 3
Insurance business regulated in line with EEC 3
EEC-China trade agreement signed 3
EEC fishing arrangements extended 3
Japan should increase imports of manufactures: Alan Williams 3
Increased fees for TIR carnets 3

Home news

Passengers to pay for aviation security 4
Huckfield inspects Cornish tin mine 4
Study looks for more jobs for Merseyside 4
Printing company to occupy advance factory at Rock Ferry 4
SDA expands investment in Stonefield Vehicles 4
Limited penalties in metrication orders 5
Limit raised in hire-purchase transactions 5
Cadbury Schweppes food prices increase accepted 5
Government sales 5
Price Commission given more time for sectoral reports 6
Price Commission merges London offices 6
Scottish electricity board's increases approved 6
Industry consulted on drivers' hours regulations 6
AUC changes name and address 6
Official appointments 6
Patents endorsed 'licences of right' 6
New industry information head 6
Engineering design awards 8

New publications 7

New products 10

Technology news

Olympus engine to be developed as mini power station 11
Breathing machine employs advanced technology 11
Air pollution and the organic chemical industry 11
Solving bulk materials handling problems 11

Overseas trade news

Seminar explores the running of outward missions 12
Selling opportunities in Australia: seminars 12
ECGD general purpose lines of credit 13
TUC supports Export United 14
Scots mission to Finland 14
ECA's new cost-of-living figures 14
Scotland-Romania link signed 14
New ship for The Gambia launched 14
Notice to importers 1673: Iron and steel imports from the Soviet Union 14
Market report: West Berlin 16

Exhibitions

Nearly a million visitors to French Agriculture Week 20
Japanese market hungry for British food 20
Need to raise UK-GDR trade to new levels 20
Loudspeakers boom at Paris hi-fi fair 21
Carpet firms pile on pressure in Japan 21
Encouragement in a dull footwear market 21
Children's wear strikes right note at New York fair 22
UK takes major orders at Yugoslav printing fair 22
Freak weather hits attendance at Scandinavian fashion fair 22

Export services 23

Country data

Australia 24, Bahrain 24, China 24, India 24, Libya 25, Nigeria 25, Papua New Guinea 26, Senegal 26, South Africa 26, Spain 26, Sri Lanka 26, Sweden 26, Thailand 27, United States 27, Uruguay 27

European community news

Standing committee discusses work sharing 29
Silkin to fight for CAP reform and milk marketing boards 29
EEC seeks misleading advertising measures 30
Summer time in the EEC 30
Imports of Canadian kraft liner 30
Japan proposes expansionary measures in talks with EEC 31

Statistics

The economy: selected indicators 32
Economic indicators of the industrial countries 33
Trends in invisibles in 1977 36
Retail sales in February 37
Hire purchase and other instalment credit business in February 38
Check trading in 1977 39
Poor year for textiles in 1977 39
New companies registered in Northern Ireland: January and February 42
Manufacturers' stocks in January 42
Cost indices for the aerospace and radio, radar and electronic capital goods industries 43
Gross domestic product: slight increase 43
Office development permits: fourth quarter and the year 1977 44
Films Act 1960: combination of quota periods 45
Registrations of British, community and foreign films 45
Index to statistics 45

Readers' reply service 46

Index

Volume 29, October to December 1977
loose insert

Trade and Industry this week

HOME

White paper on nationalised industries

Government proposals for the control of nationalised industries are put forward in a white paper published on Wednesday.

The white paper (Cmnd 3437) is a response to reports produced by the National Economic Development Office and the National Consumer Council in 1976.

On institutional arrangements the government proposes to empower ministers to give either general or specific directions on matters of national interest. This, the white paper says, would clarify accountability where the government had decided to overrule a board's judgment or to direct it to do something in the national interest. A direction would be in the form of a statutory instrument subject to parliamentary procedure.

Chairmen of the industries have been asked to consult with the unions and to put forward by August 1978 proposals for improvement in consultation and participation.

The goverment intends to complete as soon as possible the setting and publishing of new financial targets for the nationalised industries.

The test discount rate in use since 1967 still left, the white paper states, a need to relate the cost of capital to the industries' financial objectives. The government is discussing with the industries the development of a more direct way of relating the opportunity cost of capital to their financial performance. The government's view is that the industries should treat the opportunity cost of capital – to be earned on new investments over their working life – as 5 per cent in real terms before tax.

The financial target will remain the primary expression of the financial performance which the government intends the industries to achieve.

On pricing policy, the white paper states that for the industries whose market positions give them scope for setting the prices they charge, the goverment sees its main role as determining the overall financial target, and hence the general level of prices charged by that industry.

Government backs BL plans

British Leyland is to get £450 million of new equity in 1978 from the National Enterprise Board and under the Industry Act 1972. In deciding to back the company's corporate and business plans, both the government and the NEB accept, in principle, that a total of £850 million of public funds will be needed over the period 1978-81.

In a written reply to parliament on Monday, Eric Varley, Secretary of State for Industry, said that overall the public finance envisaged in the plan and the NEB's recommendations would remain within the £1,000 million total originally indicated by the Ryder report and accepted in principle in April 1975 by the government. £150 million of this had been advanced by the end of 1977.

The government has concluded that it was right to give British Leyland the backing recommended by the NEB and envisages that, if the company progressed on the lines set out in the plan, the necessary funds would be provided. In future the financial provision would be looked at annually.

To assist the monitoring of the company's performance, said Mr Varley, the government had also accepted the NEB's recommendation that a financial duty should be imposed on the NEB under section 6 of the Industry Act 1975 in respect of its responsibility for British Leyland, of a 10 per cent return on capital to be earned by 1981. The duty for later years will be considered further when the company's 1979 corporate plan is put forward.

The government accepted the NEB's proposal that the NEB should provide £300 million of the £450 million. This would take the NEB close to its present financial limit of £700 million, and Mr Varley laid a draft order on Monday to raise the limit to £1,000 million. He also laid an order for affirmative resolution under section 8 of the Industry Act 1972 to provide the balance of £150 million.

England's major roads – £300m a year

Investment of some £300 million a year on the major and trunk roads in England for which the Secretary of State for Transport is responsible is envisaged in a white paper published on Tuesday.

There will be a more rigorous approach to priorities within the total public expenditure available for transport, with emphasis on vital industrial routes, states the white paper, 'Policy for roads: England 1978' (Cmnd. 7132, HMSO, £1.60).

The review of the relative priority of some 400 schemes listed in the white paper, all costing more than £500,000 each, is still in progress. Already 34 schemes costing in all about £90 million have been dropped and replaced by smaller schemes at a total cost of about £20 million.

Regional as well as national aims are accounted for in the white paper. The importance of road communications to the support and development of industry in the regions is recognised, particularly regarding attracting industry to assisted areas and the promotion of employment.

Rolls-Royce wins PanAm engine deal

Rolls-Royce has won a major order for its RB-211 engine from Pan American World Airways, it was announced on Tuesday. The engines will be used to power PanAm's new fleet of Lockheed TriStar airliners which are replacing the airline's old Boeing 707s.

The initial order will be worth over £115 million to Rolls-Royce, but the total deal could amount to more than £250 million if PanAm takes up its options to purchase additional TriStars.

Small firms' scheme extended

An extension of the Department of Industry's scheme to help investigate the possibilities of collaboration among small firms until the £100,000 available under it has been fully taken up, was announced on Tuesday (4 April) by Bob Cryer, Parliamentary Under-Secretary of State, Department of Industry.

Answering a parliamentary question, he explained that of the £100,000 available, the total amount so far committed was about £35,000. The scheme, which was introduced in April 1976, was due to terminate on 31 March this year. But, in view of a recent increase in the number of applications for assistance, the department had decided to extend the operation of the scheme beyond 31 March until the £100,000 available had been fully taken up.

Under the scheme, the Department of Industry is able to provide 50 per cent of the cost, subject to a maximum contribution of £5,000, of feasibility studies undertaken with a view to establishing collaborative arrangements among small firms.

Any eligible organisation or group of small firms wishing to apply for assistance under the scheme should contact the Department of Industry, Small Firms Division, Abell House, John Islip Street, London SW1P 4LN, tel. 01-211 4461.

Official reserves

Britain's official reserves fell by £205 million during March to £10,910 million. Accruals of foreign currency by the public sector under the exchange cover scheme amounted to £23 million and repayments £77 million.

Air noise complaints – new procedures

Improved arrangements for registering aircraft noise complaints came into operation on Tuesday (4 April) with the move of the Department of Trade's aircraft noise unit from Heston to Harmondsworth, near Heathrow Airport.

Additional telephone lines at the new office will give improved public access to the unit. Calls received outside working hours – 0900 and 1700 hours each normal working day – at weekends, or on public holidays will be routed to automatic answering equipment. When the office re-opens the tapes from this equipment will be transcribed by the unit's staff who will note the details of each individual complaint and provide further particulars if requested.

Callers who telephone Heathrow or Gatwick airports with complaints about airborne aircraft noise will be given the option of telephoning Harmondsworth direct or of giving the details to the airport staff who will then forward the complaint to Harmondsworth. Automatic answering equipment is in use at both airports outside office hours. Complaints about the ground running of engines will continue to be investigated by the British Airports Authority staff.

The new address of the unit is: Department of Trade Aircraft Noise Unit, Government Buildings, Harmondsworth, Middlesex UB7 0DF, tel. 01-897 6016/7/8.

EUROPE

Insurance business regulated in line with EEC

Overseas insurance companies operating in the United Kingdom through an agency or branch are to be required to appoint and maintain a resident general representative here from 31 July. Draft regulations effecting this requirement and governing the authorisation of companies to carry on direct general business in Great Britain were published on Monday (3 April) by HMSO, price 25p.

These regulations have been prepared in consultation with the insurance industry. They are intended to bring into effect further provisions of the EEC's non-life insurance establishment directive which came into operation on 1 February 1976 and which marked the first big step towards a European common market in insurance. They are additional to the regulations made on 29 September 1977 which implemented the provisions of the directive dealing with classification of risks and margins of solvency.

The conditions include a requirement to submit to the secretary of state a scheme of operations covering the business to be carried on. Companies which are already carrying on direct general business will continue to be so authorised but will be expected to observe the new conditions for authorisation where applicable, including in the case of overseas companies the condition to maintain a general representative here.

Failure to observe these conditions will constitute grounds for the secretary of state to exercise his powers of intervention, including the power to order a company to stop taking on new business.

EEC fishing arrangements extended

EEC fisheries ministers meeting in Luxembourg on Monday 3 April agreed to extend the provisional fishing arrangements with Sweden, Norway and the Faroes until the end of April. The arrangements were due to expire on 15 April.

Speaking after the meeting John Silkin, Minister of Agriculture, Fisheries and Food said that before ratifying any agreements he wanted to know how the catch allocated to the EEC in the waters of the three countries would be shared out between community fishermen.

Ministers also agreed to hold a further fisheries council on 24 April.

EEC-China trade agreement signed

Li Chiang, Minister of Foreign Trade of the People's Republic of China (left) and Mr K. B. Andersen, president of the EEC council of ministers and Danish Foreign Minister sign the five-year EEC-China trade agreement in Brussels on Monday.

OVERSEAS

Japan should increase imports of manufactures: Alan Williams

Japan should reverse its one-way relationship with other industrial countries by increasing its imports of manufactured goods and its manufacturing investments in industrial nations, Alan Williams, Minister of State for Industry, said in Tokyo on Monday.

Mr Williams told members of the Keidanren, Japan's 'CBI', and the Japanese Overseas Enterprises Association that world trade was sluggish, and that although the remedies to the world's problems look different, viewed from London, Washington, Bonn, Paris or Tokyo, the leading nations of the world had to decide to act together or there was a risk of a breakdown of the free trading system which had helped to raise living standards worldwide over the last 30 years.

He continued: 'A lot of friction has arisen because of the isolated position of Japan among the industrial nations. Japan is a great exporter of manufactures, but not yet a great importer.

'Japan has a rather one-way relationship with other industrial countries – and that is a vulnerable, and increasingly uncomfortable, position to be in. The longer term solution is for Japan to increase its imports of manufactures from other industrialised nations, and its manufacturing investments in them'.

Mr Williams is visiting Japan from 1 to 7 April for talks with enterprises and companies known to have an interest in setting up manufacturing facilities in Europe, as part of a campaign to attract inward investment to the UK.

Increase in fees for TIR carnets

Fees charged for a certificate of approval required by the Customs Convention on the International Transport of Goods under cover of TIR carnets (TIR Convention 1959) will be increased from 1 May, the Department of Transport announced on Monday.

Only goods vehicles making international journeys require these certificates and relatively few operators of goods vehicles are involved. The current fees have not been increased since they were first fixed in 1968.

The TIR Convention (Transport International Routier) to which the United Kingdom is a party, simplifies customs requirements by permitting vehicles, whose goods carrying compartments have been sealed in the country of origin, to cross frontiers without customs inspection.

Before a vehicle is used under a TIR carnet, it must have a certificate of approval as proof that it complies with the requirements of the TIR convention.

Home news

Passengers to pay for aviation security

From Saturday April 1 the cost of aviation security was transferred from the taxpayer directly to the industry and ultimately to the passenger. This new measure, the Civil Aviation Act 1978 which reached the statute book last week, establishes the aviation security fund out of which the Department of Trade will reimburse to airport authorities and others the expenses incurred protecting aircraft, airports and air navigation installations against acts of violence.

The fund is to be financed by a levy on airport authorities. For 1978-79 the levy will be at the rate of 80p per arriving passenger. Airport authorities are expected to pass on the levy to airlines through their landing fees and airlines in turn to recover their expenses through the fares structure.

The levy will be collected at 28 airports, those which are licensed or owned by the Civil Aviation Authority and which handled more than 50 000 passengers in 1976. Future levy arrangements will be considered by a working group which will meet under Department of Trade chairmanship and will comprise representatives of airport authorities, airlines, Air Transport Users' Committee, trade unions and the travel trade. The rate of levy will be announced each September and come into operation the following April.

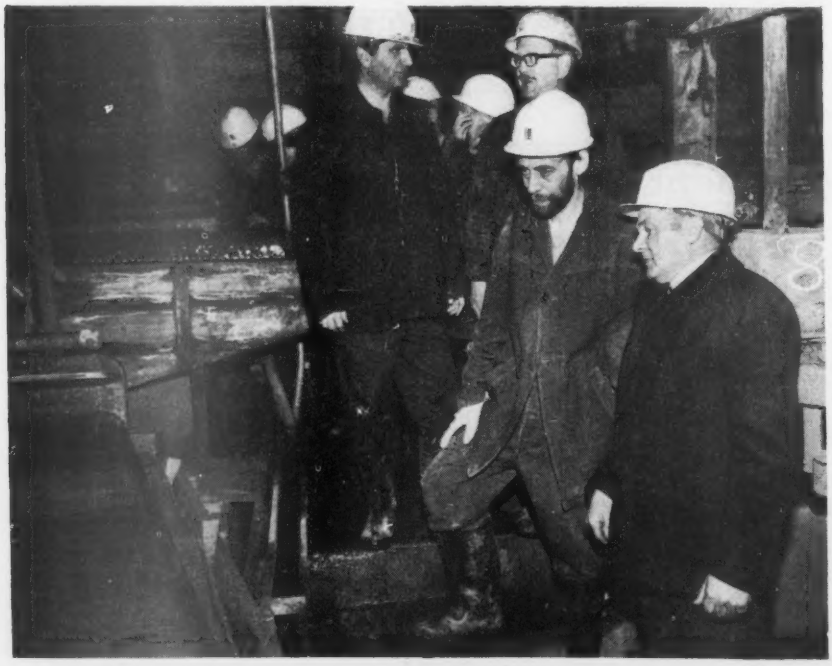
There will be some exceptions to the levy arrangements. The major ones will cover passengers who are: children under the age of three; travelling in aircraft not operating for hire or reward; flying in aircraft of less than 5 000 kg maximum total authorised weight; and transit passengers.

The new act contains other provisions. Chief among them are provisions for an increase in the borrowing powers of the Civil Aviation Authority and British Airways, and for clarification of airport authorities' powers to act for environmental as distinct from operational and financial reasons and enable them to structure their charges so as to encourage the use of quieter aircraft.

The cost of all security measures recommended by the Department of Trade under the Protection of Aircraft Act 1973 totalled £15 million in 1977-78. It is expected to rise to £19 million in 1978-79. These expenses have previously been reimbursed out of monies voted by parliament under the Protection of Aircraft Act 1973 and the Policing of Airports Act 1974.

Huckfield inspects Cornish tin mine

Leslie Huckfield, Parliamentary Under-Secretary of State for Industry recently visited Geevor Tin Mines, near St Just. He is seen, (second from right) watching operations with members of the mining company. High world prices for tin have stimulated greater interest in mining in Cornwall since the early 1960s than at any other period during this century. At present, Cornish mines supply 25 per cent of Britain's requirements but future prospects for the industry largely depend upon the level of tin prices and the grade of ore mined.



Study looks for more jobs for Merseyside

A study is being carried out on the inner Merseyside area with the objective of devising a strategy which will lead to the creation of additional permanent jobs. PA Management Consultants are to carry out the study, which they are expected to complete by mid-1978, on behalf of the north west regional office of the Department of Industry.

The consultants are to identify the opportunities available and the sectors of industry likely to be able to take advantage of them. They will also evaluate realistic targets for growth and development of existing and new business in the area, and recommend the most appropriate means of achieving them.

Printing company to occupy advance factory at Rock Ferry

Willmer Brothers Ltd is to occupy advance factory premises of about 530 m² built by the English Industrial Estates Corporation on the Department of Industry's Rock Ferry Industrial Estate, Birkenhead.

Willmer will use the new premises for its Linotype letterpress book printing division, a by-product of which will be Bakelite moulding of trade composition for rotary letterpress. Already additional employees have been brought in and it is hoped to provide work for up to 30 people over the next few years.

SDA expands investment in Stonefield Vehicles

The Scottish Development Agency has taken a majority shareholding in Stonefield Vehicles Ltd, the Ayrshire rough terrain truck manufacturers. A further £2 million has been injected into the company, increasing investment to £3 million, and the agency has appointed two new directors.

The fresh injection of capital follows a comprehensive study into the year-old company by John Barber, former managing director of British Leyland, whose report confirmed the

agency's assessment that the Stonefield rough terrain vehicles had a sound commercial future.

Production is expected to develop to 2000 vehicles a year employing around 400 people, with a spin-off bonus for west of Scotland industry through component manufacture and sub-contract work.

The agency's investment, which increases its shareholding from 49 to 76 per cent, will now be in the form of 490 000 £1 ordinary shares, 1 400 000 £1 voting preferred shares and a £1,100,000 loan. The original investment comprised 490 000 £1 ordinary shares, and unsecured loans totalling £545,000. The remaining shares are held by the family of the late Mr McKelvie.

Limited penalties in metrication orders

John Fraser, Minister of State for Prices and Consumer Protection, has made it clear that contravention of the two orders on metrication currently before parliament *(Trade and Industry*, 17 March, page 576) could not lead to imprisonment. He said that the maximum penalty which the courts could impose upon a trader for contravention of these orders was a fine of £50 and, possibly, forfeiture of any weights or measures used.

In legal terms it would be difficult to think of a more restrained way of providing statutory backing for the various timetables. Moreover in practice enforcement authorities responsible for weights and measures legislation give traders every opportunity of complying with regulations before they contemplate bringing a prosecution.

He also wished to make it clear that the orders left the customer perfectly free to ask for imperial quantities and the retailer free to show the imperial equivalents alongside the metric units and price. The government fully recognised that consumers needed relevant information at the right place and at the right time in order to adjust to the new system and also needed to be able to compare prices during the transition.

The point had been reached where trade and consumer organisations in general accepted that the change should be made and that there needed to be a legal basis to support it. What the orders represented is a translation of the wishes of those consulted into statutory instruments.

Limit raised in hire-purchase transactions

The upper limit under which consumers are protected in hire-purchase transactions will be £5,000 from 1 June 1978. An order has been made and published by HMSO (SI 1978/461), following the approval of parliament, which will ensure that consumers have full protection under hire-purchase legislation where the hire-purchase price or total purchase price is not more than £5,000. At present the upper limit of such transactions is £2,000.

Although in general the provisions of the new order will not be retrospective, certain provisions will apply to hire-purchase and conditional sale agreements within the £5,000 limit made before the operative date. Among these provisions will be the restrictions on the right of owners to repossess goods without a court order where one-third or more of the total hire-purchase price has been paid.

The present legislation will eventually be replaced by the Consumer Credit Act 1974, when it is fully operative, to give the consumer greater protection.

Cadbury Schweppes food prices increase accepted

Roy Hattersley, Secretary of State for Prices and Consumer Protection, has accepted the recommendations of the Price Commission's report following its investigation into Cadbury Schweppes Foods Ltd's proposals to increase the prices of their grocery products, including cocoa and cocoa-based products. The report was published on 14 March (*Trade and Industry*, 17 March, page 570).

He has accepted its recommendation that there should be no restriction on the notified price increases and noted its observations on the company's practices in relation to discounts to retailers. The question of discounts to retailers is one which is being studied more widely by the Monopolies and Mergers Commission, following the reference made to it in July 1977.

Government sales

Sales by auction

19 April 1978 – Furniture

Location
Regional Depot RAOC, Moreton-on-Lugg, nr. Hereford.

Auctioneers
Russell Baldwin and Bright (Dept L), 19-21 King Street, Hereford (0432 55441)

The sale consists of mainly small or single item lots of furniture. Catalogue price 20p, postage 10p.

20 April 1978 – Miscellaneous

Location
Golden Lion Hotel, King Street, Stirling

Auctioneers
Dixon and Wallace (Dept L), Bank Buildings, Graham Square, Glasgow G31 1AW (041-554 2447)

The stores are lying at various depots in Scotland and include vehicles, tools, engineering equipment, clothing, textiles, furniture and other items. Catalogue price 40p, postage 15p.

Catalogues, which give details of the lots, conditions of sale, viewing times etc, are available from the auctioneers from two weeks before and up to the day of the sale.

G. F. SINGLETON & CO.,

Industrial Auctioneers and Surveyors announce their

MACHINERY AUCTION PROGRAMME

as follows:

date	*Description*	*Location*	*Client*
12 April	Garment manufacturing	Wigan	Eckersley
19 April	Contractors plant and woodworking	Warrington	Barnes
20 April	Letterpress	Manchester	Redfern
25 April	Contractors depot	Royton, Oldham	Monks
26 April	Contractors plant and woodworking	Liverpool	Woods
26 April	Motor vehicles	Liverpool	–
5 May	Vending machines (By tender)	Belfast	Catequip
10 May	Contractors plant and woodworking	Rossendale	F.R.H.
16 May	Provender milling	Kings Langley, Herts	
18 May	Textile spinning	Stockport	Pear New Mill
15 June	Modern factory, office and yard	Oswaldtwistle	Ward

Catalogues when ready obtained on application from: 53 King Street, Manchester, M2 4LR (Tel. 061-832 8271).

Price Commission given more time for sectoral reports

More time has been given by Roy Hattersley, Secretary of State for Prices and Consumer Protection, to the Price Commission for the completion of its examinations into the production and distribution of books and non-ethical medicines, and the distribution of footwear.

The commission's reports of these examinations of prices, costs and margins in these sectors are now to be made before 31 May for books and before 30 April for the other two sectors. Particulars of the variation of the original directions are:

On 12 September 1977, the Secretary of State for Prices and Consumer Protection pursuant to section 10(1) of the Price Commission Act 1977 gave directions to the Price Commission requiring them to examine and, before 31 March 1978, to make reports to him on certain questions relating to the publishing, printing and binding, and distribution of books, with particular reference to technical books; to the production and distribution of proprietary non-ethical medicines; and to the distribution of footwear. After consulting the Price Commission and the Director General of Fair Trading, the secretary of state pursuant to section 10(3) of the act, has varied the said directions so as to require the Price Commission to make the said reports before 31 May 1978 in the first case and before 30 April 1978 in the other two cases instead of before 31 March 1978.

Price Commission merges London offices

On 3 April the north and south London offices of the Price Commission were merged. The new regional offices are at 5 Trinity Street, London SE1 1DH, tel. 01-403 0565, where the London (south) office has previously been located. It is now responsible for commission activities in the London postal districts. The manager is Arthur Friggens, previously regional manager for London (south).

During the 12 months from February 1977 to January 1978, the two London offices dealt with more than 7000 inquiries and complaints from the public, industry and commerce. The commission has 14 regional offices: Belfast, Birmingham, Bristol, Cambridge, Cardiff, Crawley, Glasgow, Leeds, Liverpool, London, Manchester, Newcastle upon Tyne, Nottingham and Reading.

Scottish electricity board's increases approved

Following representations by the South of Scotland Electricity Board, the Price Commission has approved under the safeguard regulations the full amount of the increases in charges sought by the board. This will mean an overall average increase of 9.9 per cent in electricity tariffs, 12.5 per cent in connection charges for new domestic supplies and various special charges by around 11 per cent, as originally proposed by the authority.

The commission announced on 10 March that increases in charges proposed by the board would be subject to investigation, due to be completed by 12 June. The immediate effect of the commission's decision to investigate was to stop the implementation of the proposed increases. However under the safeguard regulations the commission was obliged to agree to an overall average increase of 9.8 per cent, as against the notified increase of 9.9 per cent. In the circumstances the commission saw no virtue in a restriction of this size and approved the full amount.

Industry consulted on drivers' hours regulations

The transport industry is being consulted on the regulations which the government wishes to make soon to 'harmonise' with EEC regulations on drivers' hours. Details of the staged implementation of regulation (EEC) no. 543/69 were decided upon recently by the EEC Commission (*Trade and Industry*, 13 January, page 55).

Because of the nearness of this decision to the date of the start of the phased programme on 1 January it had not been possible to bring into operation regulations to make the provisions of the Transport Act 1968 on duty time and spendover compatible with the provisions of the EEC regulations.

The proposed regulations are designed to harmonise the two sets of rules in cases where a driver divides his time between vehicles which are within the scope of the EEC regulations and those to which the regulations do not apply. The new rules apply to drivers of goods vehicles and passenger vehicles, but drivers of passenger vehicles are not affected by the provisions for harmonising duty time and spreadover.

Any organisation which has an interest in the subject and would like to receive copies of the consultation letter, the draft regulations and an explanatory memorandum, are invited to contact the Department of Transport on 01-212 8147 or 01-212 5387.

AUC changes name and address

The Airline Users Committee changed its name and address on 1 April 1978. It is now called the Air Transport Users Committee, although it will continue to be known as the AUC. Its address and telephone number has changed, also, to 129 Kingsway, London WC2B 6NN, tel. 01-242 3882/3.

This change of name is to reflect more accurately the committee's terms of reference, which are not confined to the activities of airlines. Its terms of reference are to make reports and recommendations to the Civil Aviation Authority for furthering the interests of air transport users including the investigation of complaints against the suppliers of air transport services; and to co-operate with any airport consultative committees which are charged by airport proprietors with furthering the interests of air transport users inside their airports.

Official appointments

Panel of insurance advisers: Edmund Dell, Secretary of State for Trade, has reappointed six of the members of his panel of insurance advisers: Mr A. H. Chester, Lloyds; Mr W. Cowan, national officer, insurance section, Union of Shop, Distributive and Allied Workers; Mr J. Gaselee, freelance journalist; Mr C. B. Heath, general manager (UK) General Accident Fire and Life Assurance Corporation Ltd; Mr J. B. Hughes, deputy chairman, Lowndes Lambert Group; Mr E. Lorenz, president, National Union of Insurance Workers. A new appointment to the panel is that of Mr J. W. James, group insurance manager, Courtaulds Ltd, and a director of the Association of Insurance and Risk Managers in Industry and Commerce Ltd.

Patents endorsed 'licences of right'

Under section 35 of the Patents Act 1949 the following patents were endorsed 'licences of right' on the date specified.

21 March 1978

1484171 BBC Brown Boveri and Co Ltd
Pipe-type gas-insulated cable

1484967 BBC Brown Boveri and Co Ltd
Rotor of an electrical machine

1484982 BBC Brown Boveri and Co Ltd
Electrical machine of vertical construction

1484983 BBC Brown Boveri and Co Ltd
Components of the supporting structure of electrical machines

1136695 Daimler-Benz Aktiengesellschaft
Improvements relating to arrangements for producing starting mixtures for injection type internal combustion engines

1149553 Daimler-Benz Aktiengesellschaft
Improvements relating to vehicle change-speed gearing

1373791 Haldor Frederik Axel Topsoe
Hydrodesulphurisation process

1414050 Rubery, Owen and Co Ltd
Trailers

1426828 Joseph Fish and Sons Ltd
Improvements relating to vehicle towbars

1467822 Societe Parisienne des Lubrifiants Nationaux et des Entrepots D'Hydrocar bures
Improvements in or relating to a process for cleaning used oils and apparatus for carrying out said process

1468178 Italsider S.p.A.
A method for the continuous production of an annealed steel of controlled hardness

1482729 Transform Verstarkungsmaschinen Aktiengesellschaft
Press for cold forming of workpieces from a metal sheet

Correction: 17 March 1978
Patent number **1182553** granted to the **Ford Motor Co Ltd** should read:

1182533 Ford Motor Co Ltd
Gas turbine regenerator seal

Any person who claims that the patentee at the time of endorsement of any of the above patents was precluded by a contract in which the claimant is interested from granting licences under the patents may apply for cancellation of the endorsement on patent form no. 45 within two months after the date of endorsement.

I. J. G. Davies, Comptroller

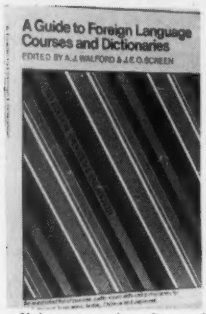
New industry information head

Michael Pentreath took up the appointment on 3 April of head of information at the Department of Industry in succession to Raymond Tuite, who has retired from government service.

New publications

Selection of publications for review on this page does not necessarily reflect the views of the government, nor do the opinions expressed. Inquiries about this page and submissions for review should be sent to *Trade and Industry*, New Publications Page, Room LG 17A, 1 Victoria Street, London SW1H 0ET, tel. 01-215 4136.

Learning the language



In an age which has seen rapid expansion of British overseas business, using and working in foreign languages has become part of the commercial way of life. So it is good to see 'A Guide to Foreign Language Courses and Dictionaries', a revised and enlarged third edition previously published under another title. Although issued by the Library Association, this unique volume must have a practical use outside the controlled world of libraries: to businessmen, teachers and all concerned with the considerable range of languages covered.

In its earlier incarnation this book confined its attentions to grammars and dictionaries. It has additional practical value now because of its extensive coverage of audio-visual material (information that is very difficult to find elsewhere). Prices are quoted throughout, and these will obviously change but probably the only unsatisfactory aspect of the book is that no advice is given where to purchase the less readily available material. And so, for example the recorded guides to Byelorussian that are described may be the cause of irritation rather than help. This is not to say some advice is not given: in the case of Scandinavia, for example, local booksellers are recommended.

A Guide to Foreign Language Courses and Dictionaries; edited by A. J. Walford and J. E. O. Screen. 3rd edition. The Library Association, 7 Ridgmount Street, London WC1E 7AE. 1977. 343 pages. £10.00 (£8.00 to members). (ISBN 0 85365 259 7).

The benefits of security

With the implementation of the Social Security Pensions Act of 1975 comes the publication of a new survey of employee benefits carried out for the British Institute of Management Foundation. Although similar in scope to the previous 1973 survey, coverage is now somewhat broader, including a more detailed analysis of benefits available and the categories of workers to which they apply.

The sources for the investigation are replies to a postal survey of certain BIMF members, an analysis of each company's employee handbook and a review of the available literature. Unfortunately any conclusions which may be drawn are limited in two respects; not only was the range of firms interviewed restricted to BIMF members, but the response rate was only 41.5 per cent. It would also have been useful if an example of the questionnaire employed had been appended to the report.

Despite the limitations the report is presented in a style which, at the least, clearly indicates the wide range of benefits available, from the standard benefits such as sick pay, to paternity leave. The use of computer analysis shows how the existing situation has arisen and what factors stand to influence it's development in the future.

Employee Benefits: a survey of practice in 400 companies, by Helen Murlis. (Management Survey Report no. 37). British Institute of Management Foundation, Management House, Parker Street, London WC2B 5PT. 1978. iv, 48 pages, paperback. £20.00 (£10.00 to BIM members). (ISBN 0 85 946 082 7).

Pensions – practical guide

'Bewilderment abounds on the part of management and employees when confounded by the jargon that enshrouds pensions in a mystique of its own.' A familiar problem mentioned in the introduction to Harry Lucas's book, which is significantly subtitled 'a practical guide for all involved in pensions'.

The variety of pension schemes embracing both the private and public sectors has resulted in many anomalies. To a certain extent these must surely have caused some resentment and ill-feeling detrimental to good industrial relations. With this in mind, Harry Lucas has sought to provide a guide to the intricacies of pension schemes for those involved in collective bargaining.

This brings us to the other valuable aspect of this timely manual: it is written from a trade union viewpoint. Based on personal experience as pensions adviser to one of Britain's largest trade unions, the author describes recent developments in pensions policy, at the same time looking at the related legislation. In particular, he examines the provisions of the 1975 Social Security Pensions Act (1975 Ch 60), which is due to come into force this April.

Advice is given on specific points that have to be considered at the negotiating table, as well as a look at individual schemes that have been negotiated with specific employers. A useful short glossary rounds off the text.

Pensions and Industrial Relations: a practical guide for all involved in pensions, by Harry Lucas. Pergamon Press. 1977. 191 pages; hardback £8.50 (ISBN 0 08 021947 0); paperback £3.75 (ISBN 0 08 021946 0).

Key to Middle East sources

As the market potential of the Middle East and north Africa has expanded, so to has the volume of literature covering the subject. In this first edition of 'Middle East and North African Information Directory', the Middle East financial information service (Mefis) has attempted to provide a key to sources available. It provides an analytical list of publications potentially useful to the western businessman who has an interest in the economic, industrial and social aspects of the Middle East.

Coverage is extensive and publications included vary from newspapers and periodical articles of general interest to specific legal requirements, statistical data and market surveys. Each entry carries a bibliographical citation, including the full address of the publisher and the price, where appropriate. There is also a short comment on the publication, varying from the critically constructive to a brief description.

The arrangement of the directory requires some careful study before use. Within the two basic sections, industrial and geographical, each entry is prefaced by a coded pair of numbers. The system may aid the compiler in updating but it does not substitute for a clear layout with well defined sub-headings which encourage the use of such a reference book.

It would be unfortunate if, what is potentially a valuable search tool were not exploited to the full because of an unhelpful format. Nevertheless many interested in the Middle East and north Africa are going to find this well worth while.

Middle East and North African Information Directory 1977; compiled by Robert C. Copeman. Produced by Artoc Bank and Trust Ltd, and available from Middle East Financial and Industrial Services Ltd, Information Office, PO Box 174, Birmingham B5 7PJ. 1977. Approx 600 pages. £35.00.

The books reviewed above – and many other business books are available immediately from stock at these booksellers.

THE BUSINESS SCHOOL BOOKSHOP
Sussex Place, Regent's Park, London NW1 4SA 01-723 3902

ALAN ARMSTRONG ASSOCS LTD, BOOKSELLERS
12 Castle St, Edinburgh EH2 3AT 031-226 4201

Technical excellence marks engineering design awards

Technical excellence in the nine engineering products and the high level of innovation of the five components which have won 1978 Design Council awards show that British industry, in spite of severe economic constraints, is well able to make the fullest practical use of advances in technology. There are several examples of what 'traditional' industries can achieve by making use of technical advances in manufacturing methods, and electronic devices and by employing computers as an aid to design.

From a total of 160 submissions, the 14 award winning products and components are truly representative of the best in engineering and industrial design from British industry. While many of these sustained the quality of earlier years, the Design Council judges considered that a number of the entries did not clearly explain the principles of operation. Because these factors are often reflected in sales literature, the panel considered that greater attention should be given by manufacturers to improving the quality of this material and thereby help to extend the commercial interest of the product.

All the award winning products will be featured in an exhibition at the Design Centre, London from 22 May until 24 June 1978 and at the Scottish Design Centre, Glasgow from 17 July until 13 August 1978. The manufacturers and designers of the award winning products will be presented with certificates by the Duke of Edinburgh at a ceremony on 31 May 1978 in Glasgow City Chambers.

Products

Electronic engine controller
Ultra Electronics Ltd's programmable electronic engine controller allows all the performance characteristics of a gas turbine or diesel engine to be programmed initially by means of a keyboard during engine development and finally in the form of memory chips which provide complete engine control under preset operation conditions. The fully sealed vehicle unit takes up no more space than the average air filter. The American car industry takes over 80 per cent of the company's production of these devices.

The following are illustrated opposite.

1 High speed train
Engineers of British Rail Engineering Ltd have co-ordinated their production skills with heating, ventilating, structural, electrical, diesel and traction engineers, together with industrial designers to produce a functional train which has set new standards of travel for the thousands of passengers it carries daily. Bright decor, even illumination, comfortable seats, good thermal and acoustic insulation and air conditioning together with the efficient air suspension all contribute to a relaxed and comfortable journey.

2 Digital micrometer
Micro 2000 is the first British-made self-contained, hand-held electronic micrometer. Moore and Wright (Sheffield) Ltd commissioned Patscentre International to design the instrument. Movement of the spindle is converted into electrical pulses which are interpreted by an electronic circuit to produce a digital output on a light emitting diode display. The accuracy is within ±0.002 mm/±0.0001 in. This instrument can be used on the shop floor and on the inspection bench.

3 Machining centre
The KTM 400 computerised numerically controlled machining centre by Kearney and Trecker Marwin Ltd is designed to provide continuous path milling on the axes as well as drilling, boring and tapping. It has a working envelope of 400 mm cube and combines a disciplined approach to design with a gratifying absence of any self-conscious styling. The KTM 400 has successfully fought off strong competition from US and Japanese manufacturers.

4 Colour scanner
The remarkable capability of producing a complete set of four colour separations, on a single piece of photographic film in only one scanning pass greatly enhances the productivity of the Magnascan 550 from Crosfield Electronics Ltd. The preparation of colour separations is a critical stage in high quality colour printing. Of the 95 machines delivered all over the world so far, over half of these have penetrated the markets of the United States and Japan.

5 Anti-dust safety helmet
The Airstream anti-dust safety helmet was developed by Racal-Aplivox Ltd from an invention by the Safety in Mines Research Establishment. Not just a safety helmet providing protection against falling objects, it also provides eye and face protection and a dust free stream of air to the nose and mouth of the wearer. It has enjoyed a high rate of acceptance by workers in the steel and pharmaceutical industries.

6 Lifesaver industrial harnesses
Designed to reduce abdominal damage in the event of a fall, this Britax Ltd range of four harnesses incorporates a simple energy absorbing device, known as Cushion chek. This is a piece of pierced and convoluted mild steel plate threaded onto the lifeline. In the event of a fall, the wearer is gradually let down as the convolutions in the mild steel plate straighten and absorb some of the kinetic energy.

7 Minicomputer
Designed for a market which tends to be dominated by the United States, Digico Ltd's M16E minicomputer is a 16 bit word computer at about half the price of the nearest competition available in the UK. The most significant advance in its design has been the move from a random logic processor to a micro-programmed processor which has reduced the number of chips from 400 to only 180. Currently over 30 per cent of production is exported.

8 Bruce anchor
The sculptural qualities of the anchors of Bruce Anchor Ltd are common to all sizes in the range from 50 kg to the largest anchor designed for rigorous North Sea oil applications. Each anchor in the range is a single piece steel casting. It has unusually high holding power, due to the shank and trefoil fluke design which allows deep, stable penetration of the seabed.

Components

Proportional control valve
Sperry Vickers' KG valve is the first commercially viable application of a closed loop system in a self-contained, hydraulic valve. The ability of the valve to control hydraulic flow to an actuator independent of temperature and load variations endows the KG valve with a very consistent and repeatable performance. This is utilised to advantage in plastics injection moulding machines which can be made to produce quality mouldings from a cold machine start and without the need for a warming up period.

The following are illustrated opposite.

9 Beverage dispenser
The Hy-range dispense head, manufactured by Alumasc Ltd, allows the entire broaching and resealing of a beer keg in one single-handed operation. The dispense head slides on to the flange of the keg valve from any radial direction and the downward movement of a side lever broaches the keg and allows CO_2 to flow into the container, sending the contents up a central tube to the bar tap.

10 Electronic coin counting
Cashflow Mastermind is a coin validation and price setting system for use in vending machines, the first to combine 12 price outlets, each from 1p to 99p, with a coin mechanism with fully electronic validation. Developed by Mars Money Systems, up to five different coin denominations can be validated. The coins are held until the amount pre-set on the 12 channel mastermind unit is accumulated and then the purchaser can receive the chosen product.

11 Gas burner
Dunlop Ltd's Thermimax will burn any combustible gas without burner modification. Variations in the design of the basic matrix through which the gas and air flow to produce an intimate mixture, allow a range of only five burners to cover virtually all process heating requirements from 5000 Btu/h to 50 million Btu/h. With an impressive 100 to 1 turn-down ratio, the Thermimax offers industrial process heating users a better range of flame controllability.

12 Flexible polishing pad
The diamond embedded flexible lens polishing pad developed by Derek Prowse represents the only true invention of all the 1978 Design Council awards. It allows a dramatic reduction in the cost of polishing lenses, from over 50p to only 6p per lens. The pads are self-cleaning and cut more efficiently over extended periods. J. and S. Wylde of Leatherhead, will market the flexible lens polishing pads under the brand name of Flexilaps later this year.

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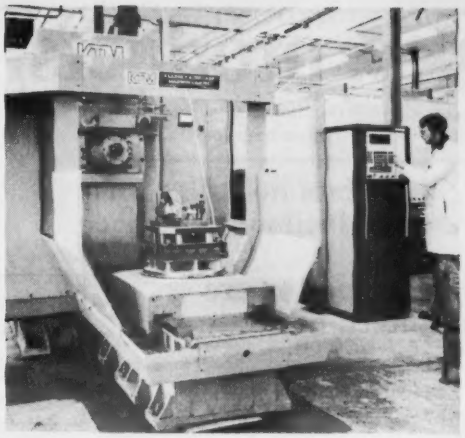

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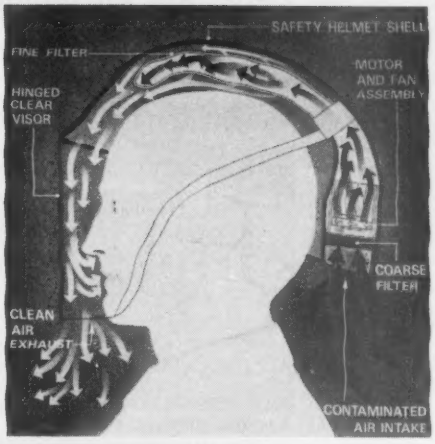

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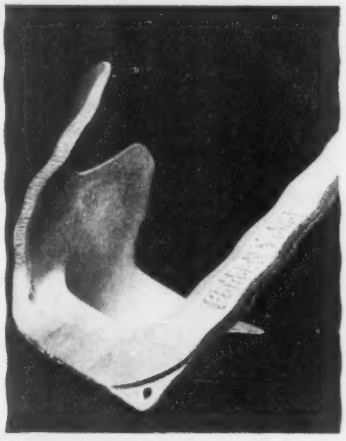

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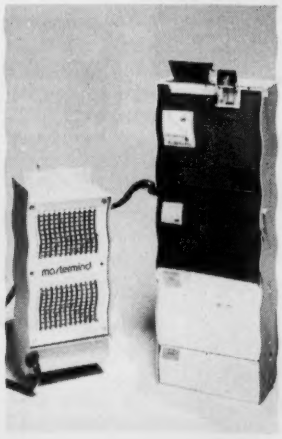

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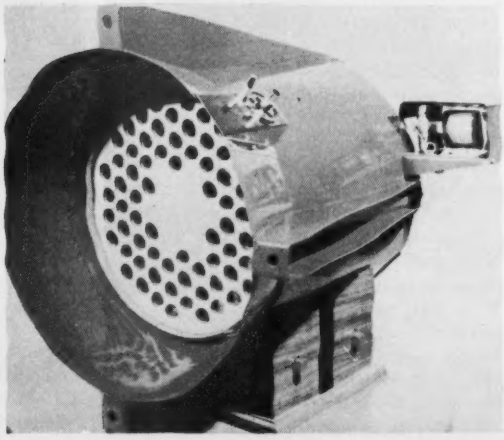

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New products

Alloy briquettes are guaranteed accurate

Briquettes used to add alloy to the mix when making cast iron have an alloy content guaranteed to be accurate to within 2 per cent of the stipulated weight. The briquettes made by Union Carbide provide ferrosilicon, fluxed ferrosilicon, silicon carbide, ferromanganese, silico-manganese or ferrochromium, and consist of regularly formed composites of the appropriate crushed ferro alloy bonded with a protective refractory binder.

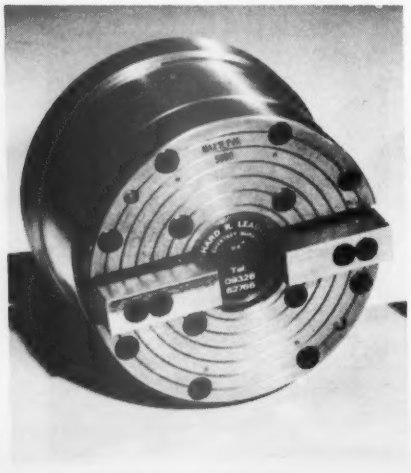
Their sizes range from 100 mm × 50 mm × 80 mm to 215 mm × 80 mm × 125 mm according to type. They are normally sold on pallets, shrinkwrapped in heavy-duty colour-coded polythene film. The briquettes are also colour-coded by type and can be supplied in loose bulk on request.

Further information: circle 524

Chuck for awkwardly shaped components

Richard R. Leader Ltd has extended its range of 12 cm dia power chucks with a new wide opening two jaw version, designed to provide greater operating flexibility by accommodating awkardly shaped and spherical work-pieces. The new chuck offers a jaw opening of 10 mm and can be supplied with any of the various types of mounting currently available within the Leader range of 12 cm dia horizontal or vertical power chucks. A feature is the design of the mechanism applying the load to the component. It ensures that maximum jaw grip is achieved with the jaws in the fully in-position, exactly where typical workpieces need to be gripped.

Further information: circle 525



Freepost reader service

For further information on items in this section, circle the corresponding number on the reader services page near the end of the magazine.

Generator for temporary traffic lights

Sturdy 1-kVA portable generating set has been designed by Jonlaw Engeering Company for use with temporary traffic lights at road construction and repair sites. Major design feature of the Model LT 01 is that its generator is coupled directly to the diesel engine, eliminating the conventional belt drive with its need for frequent adjustment to avoid slip. The set complies with British and European standards and can be supplied for any voltage output specified by the customer.

Further information: circle 526

Boiler control system saves fuel

Savings of 2 per cent of fuel may be achieved with a simple air control system from Hamworthy Engineering, Poole, that ensures boilers operate at optimum efficiency. Developed originally for shell boilers fired by rotary burners, the electronic-efficiency-trim system may also be used with water-tube boilers and in processing plant. It operates effectively right through the burner turn-down range.

By accurately regulating air intake levels, the equipment overcomes the problems often encountered in conventional linkage systems, particularly in plant not employing specialist boiler staff, including hysteresis, wear and variations in air temperature or fuel pressure. A special way of biasing the system's combustion-air cam setpoint within safe limits while using the burner's normal cam-and-linkage system ensures safe burner operation even should the trim control system fail.

Further information: circle 527

All-purpose automatically controlled battery chargers

A range of automatic battery chargers from S and W (Electronics) Ltd incorporates what is claimed to be the only control device that can be used for every charging application from low to high current or voltage and from the domestic to the industrial charger, whether vented or sealed. The Webb automatic charger controller, developed with the backing of the National Research Development Corporation, can also be supplied on its own for fitting to existing battery chargers.

The company's automatic chargers incorporating the 40 mm × 45 mm × 30 mm controller behave like normal time-controlled chargers for the first phase of the charging operation and deliver a taper charge. Whereas a standard charger, however, continues to deliver full current for the time set, irrespective of the state of the battery so that gassing or worse may occur, the controlled charger anticipates the point at which a battery becomes fully charged and smoothly reduces the charge so that gassing is reduced to a minimum and battery life prolonged.

Further information: circle 528

Drilling machine has numerical control

This drilling machine is designed to meet demands from industry for high output, low cost, fully numerical control. The six-spindle turret with tool indexing from tape gives fully automatic machining cycles, thus enabling one operator to look after several such machines. Simplicity of design, says Grimston Machine Tools, ensures quick, uncomplicated tape programming and low cost maintenance. Standard equipment includes automatic central lubrication slideways, flood coolant system, electrical equipment for the machine – 200, 380 or 415V, and for numerical control – 240/1/50 cycles. Optional numerical extras are available.

Further information: circle 529

Technology news

Olympus engine to be developed as mini power station

Rolls-Royce's Olympus 593 aero engine, powerplant of Concorde, is to be marketed for industrial ground-based applications, first with the electrical power industry from 1981. The largest fully-developed core aero engine available in the world today, it is being presented as an industrial power unit supplying around 80 000 gas horsepower or 50 000 gas kW of electrical power from a single three ton power unit. Power of this magnitude has never before been available from such a small unit.

Under development at Ansty, near Coventry, the industrial version of the engine is scheduled to be completed by 1981. It is planned to gain operational experience with a trial unit in the field before production units are released for utility operation.

Olympus 593 gas generator is a twin spool engine with two mechanically independent compressors – seven stage lp and seven stage hp – in tandem, each driven by a separate single stage turbine giving an overall pressure ratio of 13.4 to 1. This arrangement permits the hp and lp systems to run at their own optimum speed for any given output, giving the industrial gas generator a high degree of operational flexibility, high part load efficiency and a lower starting power requirement. The 593 gas generator is both rugged and simple and is designed on proven technology rather than advanced technology.

Easily transported

Construction of the industrial Olympus 593 is modular, each section of the engine being designed for removal as a separate unit at the operators site if required. The small size and weight of the total gas generator also permits easy transportation in the event of removal from site to the operators base workshop. It has also been designed from the outset to be operated on an on-condition basis by the use of borescope probes enabling virtually all internal areas of the compressor, combustor and turbine to be inspected without stripdown.

The industrial gas generator design embodies the rotor system of the flight engine with the compressor spools rematched to meet ground level operation. To cope with the more corrosive atmosphere encountered in industrial conditions, the hp turbine nozzles and rotors and the lp nozzles will be manufactured in different material.

The combustion system has been modified to burn diesel with low smoke and a water injection scheme has been engine demonstrated to suppress nitrous combustion products within the limits specified by the US Environmental Protection Agency. A parallel development of a dry combustion system is in hand to provide suppression without water injection.

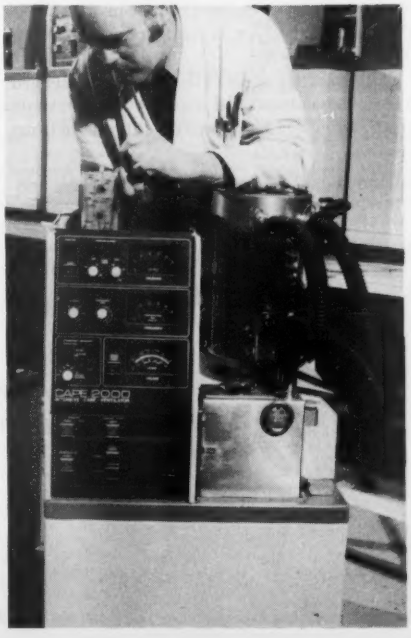
The conversion of the exhaust energy from the gas generator involves a wholly new power turbine to be designed and built by the industrial and marine division. There are two versions, a three-stage 3000 rpm design and a two-stage 3600 rpm design, the two sharing almost all their components as parts of common design.

The 593 joins the existing range of Rolls-Royce industrial gas turbines developed from the company's aero engines. The manufacturer can now supply a comprehensive range of packaged power stations from small, high efficiency RB.211 powered set of 25 000 kW (50 000 kW from a double ended set) and 30 000 kW (60 000 kW double ended) using the current Olympus C gas generator in addition to the 50 000 and 100 000 kW (double ended) 593 powered units.

Breathing machine employs advanced technology

One of the first of a new range of intensive care ventilators to aid a patient's breathing contains many new technological advances. It is fully autoclavable in high-temperature steam up to 140°C with the exception of the diaphragm of a small valve which is disposable and is renewed after sterilisation. There are two high-efficiency filters. The first ensures that the breathing mixture is free from airborne contamination; the second that any contamination from the patient is not released into the atmosphere. Developed by Cape Engineering Co Ltd, the ventilator can be quickly transferred from one patient to another.

Further information: circle 530



Air pollution and the organic chemical industry

Under the auspices of the Economic Commission for Europe, a seminar on 'Air pollution problems of the organic chemical industry' will be held in Szczecin, Poland from 16 to 20 October 1978. It will probably be followed by a study tour of the Polish industry.

The seminar will provide the possibility for administrators, researchers and planning experts to evaluate the present situation and trends concerning air pollution problems taking into consideration other environmental aspects of specific branches of the organic chemical industry. It offers an opportunity to exchange and study recent experience and process developments in relation to air pollution prevention and control as well as other environmental matters related to organic chemical bulk processes and organic chemical processes from which highly toxic chemicals may be emitted.

Individuals or companies interested in submitting papers or in attending the seminar are invited to get in touch with the Department of Industry, Room 507, Dean Bradley House, 52 Horseferry Road, London SW1P 2AG, tel. 01-212 0383.

Solving bulk materials handling problems

A seminar aimed at people responsible for planning, design, installation and operation of bulk materials handling systems is to be held at Wallsend on 10 May. The next in a series organised by the Department of Industry's Committee for Materials Handling in conjunction with Warren Spring Laboratory, it is intended to increase companies' awareness of current techniques and design both for individual items of plant and for complete bulk materials handling systems.

Chairman for the day will be H. N. Wilkinson of British Steel Corporation, who will begin with a talk entitled Better materials handling – improvements are possible, giving examples from iron and steelworks. Other topics are A practical approach to hopper design; Pneumatic conveying of dry particulates; Materials handling systems and selection of equipment and Bulk handling – recognising the pitfalls. Speakers will be from ICI Ltd, Thames Polytechnic and Warren Spring Laboratory.

Further details can be obtained from Mrs G. R. Fuller, Materials Hændling Secretariat, Department of Industry, Room 525 Ashdown House, 123 Victoria Street, London SW1E 6RB (tel. 01-212 8979). Early booking is advisable.

Overseas trade news

Seminar explores the running of outward missions

To exchange views on the running of the outward missions scheme the British Overseas Trade Board held a one-day seminar at the Cumberland Hotel in London on 22 March. The seminar, the first of its kind ever held, was one of the recommendations made by a working party set up by the BOTB to review the outward missions scheme with the aim of improving the efficiency of the operation and ensuring that exporters taking part in missions receive the best possible service.

Over 150 representatives of trade associations and chambers of commerce and other organisations from all parts of Britain attended the event, and this high-turn-out reflects the interest that British industry in general has for the BOTB's outward mission scheme.

Mr M. Cochlin, director of Fairs and Promotions Branch, introduced and chaired the seminar, which was planned to be as comprehensive as possible. There was a presentation from BOTB containing the major elements of the scheme. This included presentations from Mr G. Burnett of Fairs and Promotions Branch, Mr B. Harding of General Export Services Branch, Mr H. McBrinn of the Foreign and Commonwealth Office and Mr J. Cole-Morgan, head of BOTB's publicity unit. The position and potential of the BOTB area advisory groups was then related by Mr R. Fuller, deputy chairman of the Latin American Trade Advisory Group.

Mr L. Worrall of Begg Cousland, who has frequently taken part in these missions, presented the needs of private industry, based on his long experience with trade missions. This was followed by the travel aspects of the event, headed by Mr H. Appleyard of British Airways and Mr G. Malyon of British Caledonian Airways.

At lunch there was an address on general exporting and a summary of Britain's performance from Jim Wilks, chief executive of BOTB.

After lunch there were two case studies. The first on 'horizontal' or mixed group missions was by Mr T. A. Jackson of the Birmingham Chamber of Commerce and Industry and the documentation provided a step-by-step guide to arranging this type of mission.

Mr M. Armstrong of the Association of British Oceanic Industries presented the role of the organiser of 'vertical' or single sector missions.

Between each facet of the seminar there was ample time allotted for discussion and questions and the BOTB's Fairs and Promotions Branch, which organised the event, provided each delegate with printed documentation for use in each section of the seminar.

The event was planned as an informal working discussion and consequently many took part from the floor, where the delegates quickly established a good rapport with the top-table presenters.

The consensus of opinion from the participants was that this was a very valuable and positive seminar; and their very presence at the event showed that there was immense interest and value in outward trade missions, and that British industry appreciated all the help and expertise which could be mustered to help them continue.

Purpose of the scheme

The purpose of the outward mission scheme is to encourage businessmen to visit overseas markets either to explore prospects for sales of goods or services, or to reinforce existing marketing operations.

The number of BOTB-supported outward missions has increased over the last five years from some 120 to 225, and the number of firms taking part in them has correspondingly increased from around 1300 to 2600. The figures show that the overall sponsorship of the missions, which must be by a non-profit-making body according to the BOTB guidelines, breaks down into 45 per cent which are sponsored by trade associations, 41 per cent by chambers of commerce and the remaining 14 per cent by export clubs and other representative bodies.

Speakers at the outward missions seminar held in London on 22 March, organised by Fairs and Promotions Branch, Department of Trade. From left to right, Mr. Armstrong, G. Burnett, B. Harding, G. Malyon, J. Cole-Morgan, M. Cochlin, T. Jackson, H. Appleyard, L. Worrall and H. Brinn.

Selling opportunities in Australia: series of seminars

In conjunction with the British Overseas Trade Board, local chambers of commerce, and the Scottish Council, the Australia-British Trade Association is organising a series of seminars in April and May on 'The Great Australian Opportunity – the export and business potential in a growth market'.

The seminars will be held throughout the country, visiting the Inn on the Park, London, on 26 May; the Strathallan Hotel, Birmingham, on 27 April; the Dragonara Hotel, Bristol, on 2 May; the Strathclyde sub region HQ Hamilton, Glasgow, on 4 May; the Excelsior Hotel, Manchester airport, on 9 May; and the Post House, Ossett, Wakefield, on 10 May.

The seminar in London will be chaired by Sir Frederick Catherwood, chairman of the British Overseas Trade Board, and Edmund Dell, Secretary of State for Trade will give the opening address.

Speakers representing Australia include Gordon Jackson, general manager of CSR Ltd, one of Australia's largest diversified industrial group's; Bill Sweetland, recently retired director of BHP Co Ltd, which has interests in steel, minerals and petroleum; and John Leard, managing director of Australian National Industries, which deals in distribution, services and manufacturing, and Donald Douglas, federal director of the Australian-British Trade Association.

The principal subjects to be covered at the seminars include the Australian market – its actual and potential value to the British exporter in the short , medium and long term; some specific opportunities for British industry; the special characteristics of this market and how to deal with them; the after-effects of Britain's entry into the EEC, the gradual phasing out of preferential duty rates, the changes needed in attitudes, approach and methods of selling; selling to British subsidiaries in Australia; and services to help exporters.

Initial inquiries should be addressed to Colin Campbell, Director (UK), Australia-British Trade Association, 6th Floor, Dorland House, 18-20 Lower Regent Street, London SW1 4PW, tel. 01-930 2524.

ECGD general purpose lines of credit

The table below lists lines of credit guaranteed by the Export Credits Guarantee Department under which there is capacity for further export business to be financed as at March 1978.

Departmental reference	Ext. at ECGD HQ	Recipient country	Borrower	UK bank	Purpose	Loan value £m	minimum single contract value £'000s	Final date for entering into contracts
LC 499	598	Brazil	Banco Nacional do Desenvolvimento Economico	Lloyds Bank International	Capital and semi-capital goods and associated services and project business	20	100	6 May 1978
LC 773	7575	Bulgaria	Bulgarian Foreign Trade Bank	Lloyds Bank	UK plant, equipment and associated services	2	20	19 September 1978
LC 774	7575	Bulgaria	Bulgarian Foreign Trade Bank	National Westminster Bank	UK plant, equipment and associated services	3	20	6 September 1978
LC 381	7575	Czechoslovakia	Ceskoslovenska Obchodni Banka AS	Lloyds Bank	UK capital goods and associated UK services	2	5	30 June 1978
LC 640	321	Guyana	Guyana National Co-operative Bank	Lloyds Bank	Capital plant, equipment and associated services	4	15	30 April 1978
LC 809	7575	Hungary	National Bank of Hungary	Morgan Grenfell and Co Ltd	UK plant, equipment and associated services	3	10	16 September 1978
LC 835	7575	Hungary	National Bank of Hungary	Morgan Grenfell and Co Ltd	UK plant, equipment and associated services	5	15	21 June 1979
LC 756	7368	Irish Republic	Lombard and Ulster Banking Ireland Ltd	Lloyds Bank	Capital plant and associated UK services	1	30	6 April 1978
LC 762	7368	Irish Republic	Electricity Supply Board	Hill Samuel and Co Ltd	Capital plant and equipment associated with the development of the electricity supply	3	30	3 November 1978
LC 416	7368	Israel	The Maritime Bank of Israel Ltd	Manufacturers Hanover Export Finance Ltd	Capital plant and associated UK services	1	10	16 August 1978
LC 734	7368	Israel	United Mizrahi Bank Ltd	Manufacturers Hanover Export Finance Ltd	Capital plant, equipment and services	2	15	9 August 1978
LC 771	7368	Israel	Bank Leumi le Israel BM	N. M. Rothschild and Sons Ltd	Capital plant and associated UK services	4	10	27 June 1978
LC 815	7368	Israel	The First International Bank of Israel	N. M. Rothschild and Sons Ltd	UK capital goods and associated services	2	15	2 February 1979
LC 687	471	Kenya	Industrial Development Bank Ltd	Morgan Grenfell and Co Ltd	Capital plant, equipment and associated services	2	125	30 June 1978
LC 599	471	Kenya	Development Finance Co of Kenya Ltd	Manufacturers Hanover Export Finance Ltd	Capital plant, equipment and associated services	1	25	24 April 1978
LC 760	339	Korea, South	Korea Exchange Bank	Lloyds Bank	Capital plant and associated services	10	20	31 August 1978
BC(MC) 37/99029	595	Mexico	Petroleos Mexicanos	Baring Bros	Capital plant and services (for PEMEX only)	20	10	1 August 1978 (Polyethylene plant contracts)
							50	1 February 1978 (other contracts)
LC 700	7574	Poland	Bank Handlowy	Lloyds Bank	Semi-finished and finished UK steel	30*	240*	2 March 1979
LC 745	7574	Poland	Bank Handlowy	National Westminster Bank	UK capital plant and associated UK services	5	25	9 November 1976
LC 768	7574	Poland	Bank Handlowy	Barclays Bank International	UK capital plant and associated UK services	5	20	10 November 1978
LC 807	7574	Poland	Bank Handlowy	Morgan Grenfell and Co Ltd	UK capital plant and associated UK services	5	20	21 October 1978
LC846	7574	Poland	Bank Handlowy	Morgan Grenfell and Co Ltd	UK produced barley	30*	250*	31 August 1978
LC 808	7574	Poland	Bank Handlowy	Lloyds Bank	UK capital plant and associated UK services (for metal export only)	5	20	25 October 1978
LC(FC)801	7368	Portugal	Sociedade Financeira Portuguesa EP	N. M. Rothschild and Sons Ltd	UK capital plant and equipment and associated UK services	8*	35*	21 December 1978
LC 757	642	Qatar	Qatar Fertilizer Co (SAC)	Hambros Bank	Capital plant and services for ammonia and urea plants	4.4	30	17 May 1978
LC764	7575	Romania	Foreign Trade Bank	National Westminster Bank	UK capital plant and equipment and associated UK services	5	20	25 February 1979
LC777	7575	Romania	Foreign Trade Bank	Barclays Bank International	UK capital plant and equipment and associated services	10	20	8 January 1979
LC 824	7575	Romania	Foreign Trade Bank	Lloyds Bank	UK capital plant and associated services	5	20	11 December 1978
LC 710	7368	Spain	Banco Hispano Americano	Midland Bank	Capital plant and equipment	1	30	1 September 1978
LC 749	654	Sweden	Asea AB	Hambros Bank	Capital plant and equipment	1	30	31 May 1978
LC 701	7575	Yugoslavia	Titograd Investment Bank	Lloyds Bank	Capital plant and associated UK services	10	10	30 June 1978
LC 746	7575	Yugoslavia	Yugoslav Investment Bank	Barclays Bank International	Capital plant and associated UK services	10	20	30 September 1978

* Dollar figures. 1 Requests for further information on any of these lines of credit should be made to the bank concerned or to Export Credits Guarantee Department, PO Box 272, Aldermanbury House, Aldermanbury, London EC2P 2EL (tel. 01-606 6699, extensions as listed in the second column). 2 Exporters when negotiating business which might be financed under one of the above lines of credit should ensure that their contract price contains sufficient margin to cover the cost of any premium payable. These details can be obtained from the bank concerned.

Catalogues of government publications

Her Majesty's Stationery Office offer their customers a comprehensive service which will enable them to judge whether any other titles in the vast output of government publications would help them in their work or leisure. Full information about this service can be obtained by sending a postcard to Publicity Section, Her Majesty's Stationery Office, Room C46, Atlantic House, Holborn Viaduct, London, EC1P 1BN, asking for the CATALOGUE SERVICE LEAFLET.

TUC gives support to Export United

Britain's trade unionists have given their support for Export United, the successor to Export Year. At a meeting at Congress House on 21 March when the British Overseas Trade Board met representatives of the TUC economic committee, BOTB set out the success of Export Year, to which the TUC had given its full support.

In giving TUC support for Export United, representatives of the TUC economic committee stressed the key need to involve trade unionists at the workplace in the export effort.

The chairman of the TUC, David Basnett, said, 'If companies actively engage their work people in the export effort, they are rarely disappointed.'

Scots mission to Finland

Nineteen businessman representing a cross-section of British industry will set off for Helsinki on 9 April, on a five-day visit to cement their existing trade ties and establish new links with Finnish industrial and commercial contacts.

The visit has been arranged by the Scottish Council (Development and Industry) and is the council's third mission to Finland, the others being in 1970 and 1971.

The mission will be led by Mr A. S. Kyle, managing director, Robertson, Ireland and Co Ltd, Dundee, who also led the council's 1970 mission to Finland.

This mission is the fifth in the council's 1978 programme which will cover 15 countries.

ECA produces new cost-of-living figures

Member companies of Employment Conditions Abroad Ltd (ECA) have received their latest issue of cost-of-living comparisons throughout the world.

Covering 126 countries, indices based on a British consumption pattern are given and supported by the individual prices of over 100 items, as well as details of motoring costs, housing, educational and social facilities and domestic help.

The underlying information has been extracted from nearly 1000 questionnaires completed by the overseas representatives of member companies towards the end of 1977.

Figures produced by ECA suggest that the most expensive country in the world for a British expatriate, at ruling exchange rates, was Zaire, at 4.25 times UK, followed by Ghana at 3.7 and the Maldive Islands at 3 times the UK. Mexico was cheapest at 0.94.

In addition to these indices, the survey indicates the impact of inflation on the expatriate, ranging from 150 per cent in Argentina, down to a small fall in living costs in Singapore during 1977.

Further information on ECA's work can be obtained from Miss Rosamund Tracey, Membership Secretary, Employment Conditions Abroad Ltd, 13 Devonshire Street, London W1N 1FS, tel. 01-637 7604/7.

Scotland-Romania link signed

The Scottish Council (Development and Industry) has negotiated a reciprocal agreement with the Romanian Chamber of Commerce and Industry to co-operate in the development of trading links between Scotland and Romania and to promote scientific and technical co-operation in the mutual interests of the membership of both organisations.

A formal agreement was signed in the council's new Scottish Centre in London on 30 March by Sir Peter Menzies, chairman of the London committee of the Scottish Council, and Ion Constantinescu, president of the Chamber of Commerce and Industry of the Socialist Republic of Romania.

The agreement is the fourth between the Scottish Council and a national chamber of commerce in an eastern bloc country.

New ship for The Gambia launched

Judith Hart, Minister for Overseas Development, performed the launching ceremony at Ferguson's yard at Port Glasgow on 29 March of the ship designed and built in Britain to provide a vital service in The Gambia.

The 700-ton vessel, costing about £1.5 million, of which up to £1 million is being provided by the Ministry of Overseas Development as part of Britain's aid for The Gambia's development, is expected to be ready for delivery in May/June.

Notices to importers

Issued by the Department of Trade, Import Licensing Branch, Charles House, 375 Kensington High Street, London W14 8QH. Telephone inquiries should be addressed to the number at the end of the notice.

1673: Iron and steel imports from the Soviet Union

Notice to importers 1651 (*Trade and Industry*, 6 January) set out the licensing arrangements for imports of certain iron and steel products of USSR origin. Import licences were to be issued only in respect of those products arriving in the UK on and after 1 January 1978 which could be shown to have been consigned to the UK on or before 31 December 1977.

As announced in the press on 25 March 1978, a quota of 7500 tonnes has now been established for importations by 30 June 1978 of the following iron and steel products originating in the Soviet Union:

Tariff heading	Description of goods
ex 73.07	Blooms, billets, slabs and sheet bars (including tinplate bars), of iron or steel, rolled.
73.08	Iron or steel coils for re-rolling.
73.09	Universal plates of iron or steel.
73.10	Bars and rods (including wire rod), of iron or steel, hot-rolled, forged, extruded, cold-formed or cold-finished (including precision-made), hollow mining drill steel.
73.11	Angles, shapes and sections, of iron or steel, hot-rolled, forged, extruded, cold-formed or cold-finished; sheet piling of iron or steel, whether or not drilled punched or made from assembled elements.
73.12	Hoop and strip, of iron or steel, hot-rolled or cold-rolled.
73.13	Sheets and plates, of iron or steel, hot-rolled or cold-rolled.
73.14	Iron or steel wire, whether or not coated, but not insulated.
73.15	Alloy steel and high carbon steel in the forms mentioned in headings 73.06 to 73.14.
73.18	Tubes and pipes and blanks therefor, of iron (other than of cast iron) or steel, excluding high pressure hydro-electric conduits.

Licensing arrangements

The quota will be administered by Import Licensing Branch and will be allocated to traders on the basis of their past trade. Traders seeking an allocation from the quota should send their applications on form ILB/A to reach Import Licensing Branch at the address shown above not later than 24 April 1978. Page 1 of the form should be completed; on page 2 only question 1 need be answered; on page 3 and copy the applicant's name and address description of goods, tariff heading and countries of consignment and origin should be entered. The applications should be accompanied by a statement of past trade by the applicant supported by a report by a qualified, practising, independent accountant. A form for this purpose is available from Import Licensing Branch and traders should note that the statement should not include details of any iron or steel products imported under the arrangements described in the first paragraph of this notice.

This quota is likely to be heavily subscribed and it is unlikely that licences will be issued to applicants with no past trade. Importers should not therefore place orders with suppliers until it has been confirmed that they will be granted an allocation from the quota.

Letters of credit

Traders are reminded that current exchange control regulations in respect of goods subject to quantitative restrictions prohibit banks from opening letters of credit or amending those subsisting unless they are satisfied that a valid import licence has been issued for such goods.

Re-export

Applications for iron or steel products intended for re-export will be considered separately against satisfactory evidence.

Inquiries: Import Licensing Branch, tel. 01-603 4644 ext. 388/389.

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Trade and Industry market report

West Berlin: where East meets West

West Berlin is sometimes regarded as too fraught with political problems to be taken seriously as an export market. But the signing of the quadripartite agreement in 1971 has brought a new stability to this prosperous industrial city. Trade and Industry editor Gillian Samuel explains why UK exporters could profit from establishing a larger stake there.

Popular imagination makes West Berlin a city under siege, bordered by the wall to the east and isolated from the Federal Republic of Germany 170 km away to the west.

Certainly this is how it looks on the map. So it comes as something of a surprise to find that the wall is one of the least visible landmarks and that the East German border to the west is well screened by some 120 km² of scenic lakes and forest which make Berlin a booming sailing resort, home of some 60 000 yachts. However, even if the wall is physically discreet, its sinister presence casts a long shadow.

The political atmosphere in West Berlin today is probably more relaxed than it has been since the end of the war – and certainly since the erection of the wall in 1961. The new-found stability owes much to the quadripartite agreement signed by the four occupying powers (UK, United States, France and the Soviet Union) in 1971. This, plus associated agreements between the federal republic, the Berlin Senat and the German Democratic Republic, has led to a considerable simplification and improvement in the handling of traffic between the two halves of the city and along West Berlin's vital rail, road and water links with the federal republic.

Although supreme authority in West Berlin rests with the three occupying powers, which enjoy particular responsibilities in such fields as aviation and security, the day-to-day government of the city lies with the democratically elected Berlin Senat. And the ties between Berlin and the federal republic are close, particularly in the financial and economic fields. Indeed, virtually all federal legislation and international agreements (not least, of course, the treaty of Rome) include West Berlin, which plays host to EEC meetings from time to time.

Industrial strength

West Berlin remains Germany's largest industrial city, despite the phenomenal post-war growth elsewhere in the federal republic – in Frankfurt and Hamburg, for example. Industrial production is virtually on a par with that of the whole of Norway. With the exception of raw materials, all of which have to be imported, the city produces everything from electrical goods (which account for a quarter of total industrial turnover) and metal goods to chemicals, tobacco goods, food and drink, clothing, and textiles.

Berlin's industry employs just over a third (299 000) of the city's economically active population. Despite a declining industrial workforce (unemployment is virtually the same at 4 per cent as in the federal republic), productivity has been increased as a result of substantial investment and rationalisation, which has been sustained throughout the political turmoil of the last 17 years; during that time some 160 industrial firms, employing 16 000 people, have started operations in Berlin. And investment is still coming: in a major relocation project, BMW is about to transfer all motorcycle production to West Berlin from Munich, starting production next year.

But investment is not confined to FRG companies: a total of 45 British firms (BP, British American Tobacco, Fisons, Tarmac, Rentokil Laboratories, Ready-Mixed Concrete – to name but a few) also have interests in West Berlin.

Financial concessions

Undoubtedly a good part of this investment is inspired by tax and similar concessions designed to help compensate for Berlin's undeniable political and geographical disadvantages. Income tax, for example, is 30 per cent lower than in the federal republic and corporations enjoy similar preferences; there are special depreciation allowances and grants for the purchase of capital goods, or for their manufacture, and for the building of factory premises; there are concesssions on turnover tax for goods delivered to the federal republic, tax deductions on capital investment by West German investors, and favourable credit terms for any firm establishing or expanding here.

Under the Berlin Aid Law, financial and economic support is also forthcoming from the federal government which meets over 40 per cent of expenditure on the city budget, the net costs of social insurance, the local costs of maintaining allied forces, plus the subsidy for Berlin air fares and visa and other charges on the surface transit routes through the GDR.

Air of prosperity

No visitor to West Berlin can fail to be impressed by the air of economic pros-

Home of some 60 000 yachts.

Trade and Industry index

October to December 1977

Volume 29

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Issue paging and dates

1— 60	7 October 1977
61—110	14 October 1977
111—158	21 October 1977
159—206	28 October 1977
207—254	4 November 1977
255—310	11 November 1977
311—376	18 November 1977
377—416	25 November 1977
417—480	2 December 1977
481—536	9 December 1977
537—616	16 December 1977
617—672	23-30 December 1977

BN **Book notice, new publication**
LA **Leading article, longer article**
PQ **Parliamentary Question**
SI **Statutory Instrument**
Sp **Speech**
ST **Statistical Table(s)**

A

A300 Airbus
see Aircraft
A and A Industrial Equipment Ltd
Develop non-wetting humidifier, 489
Abbreviations
Used by: Department of Industry, (PQ) 431; Department of Prices and Consumer Protection, (PQ) 433
Abel-Smith, Brian
Appointed part-time adviser to EC Commissioner for Social Affairs, 332
Abu Dhabi
see United Arab Emirates
Accelerated Projects Scheme
see Industry – Industry Act 1972 assistance
Accidents
see Air safety; Health and Safety Commission; Marine *safety; Safety*
Accountancy
(*see also* European Communities – European Court of *Auditors)*
Consultative Committee of Accountancy Bodies: memorandum on company law reform, (PQ) 327; *review of company inspections, 385*
Life-Cycle Costing in the Management of Assets: a practical guide, 544
Powers authorising individuals to act as auditors to end, 258
Advance factories
see Industrial building; Industrial location
Advertising
Unsolicited literature about prize draws, (PQ) 224
Working party to devise research into current standard of press and magazine advertising announced, 379
Advertising Association
Research into advertising standards, 379
Aer Lingus
Application to operate Dublin-Liverpool-Amsterdam *route, (PQ) 497*
Aerosols
Non-clogging aerosol ink developed, 324
Aerospace industry
(*see also* British Aerospace; British Aircraft Corporation; European Space Agency; National *Aeronautics and Space Administration; Satellites)*
Exports 1977: Sept, 349; Oct, 640
Space science experiment contract, 125
Spacelab: candidates undergo tests, 549; telescope study contract, 22
Afghanistan
Tenders invited to equip hospital, 640
Agricultural machinery
(*see also* Garden equipment)
Electronic feed controller for cows developed, 267
Exhibitions and fairs: Earls Court, 483
Fertiliser spreader with 'floating' action developed, 265
Agriculture
(*see also* Agricultural machinery; Garden equipment; Horticulture)
EEC Agricultural Guidance and Guarantee Fund (Feoga): applications for aid on marketing and processing, 38
EEC Common Agricultural Policy
Beef from Lomé Convention signatories, 331
Effect on retail price index, (PQ) 330
Future of dairy production and milk marketing boards within the EEC, (Sp) 177
Important relationship between consumers and agricultural producers, (Sp) 176
Milk: encouragement of consumption rather than sales, 331
Need for reform, (Sp) 225
Prices: farm prices 1978-79, 652; monetary compensatory amounts, 331
Regulations, decisions and directives: Animal health, 443; Cattle, beef and veal, 178, 501; Cereals and rice, 38, 178, 226, 654; Corrigendum, 178; Eggs, 287; Fish and fish products, 178, 654; Flax and hemp, 178; Fruit and vegetables, 396, 501, 654; General, 654; Hops, 178, 501; Live plants and products of the flower growing industry, 654; Milk and milk products, 38, 178, 287, 334, 654; Oils, fats and oilseeds, (*correction*) 178, 396, 443; *Olive oil,* 334; *Pigs and pigmeat, 287; Poultry* and poultry meat, 287; Processed agricultural products, (*correction*) 178, 396; Seeds and plants, *38, 226, 287, 396; Soya beans,* 334, 654; Sugar, 178; Wine, 178, 443, 654
Substantial changes needed, (Sp) 419
EEC ministers: meetings see European Communities – Council of Ministers
Exhibitions and fairs: Baghdad, 639; Earls Court, 483
Fertilisers: price increases, (PQ) 636
Import licensing *see* Import licensing
Plant making animal feed from waste developed, 388
Price Commission reference: animal feeding stuffs, terms of reference, 117
Air conditioning
see Heating and ventilation
Air fares
Changes in domestic air fares, 8
European Air Fares: a discussion document, CAA, 383
Air freight
see Air transport
Air Products Ltd
Develop mobile refrigeration system, 490
Air safety
Inflatable escape slides, 422
Air traffic control
Assistants' pay award, (PQ) 389
Doppler Microwave Landing System: testing, 174; US trials, (PQ) 432
Eurocontrol: UK policy of 100 per cent recovery costs, (PQ) 329
Air transport
(*see also* Air fares; Air safety; Air traffic control; Aircraft; Aircraft noise; Aiports; Civil Aviation Authority; Civil aviation licences *and under company or airline name)*
Air services agreements: UK/Singapore, (PQ) 631; UK/Thailand, to restore services, 212
Air Travel Reserve Fund Agency payments, (PQ) 390
Concorde starts operation on London to Singapore route, 540
Export services, 30, 31, 134, 508, 646, 647
UK as keen as US on competition, (Sp) 211
UK support for international security measures, (PQ) 553
UK/Denmark air services, (PQ) 328, (PQ) 495
Air Travel Reserve Fund
see Air transport
Aircraft
(*see also* Helicopters)
A300 Airbus: UK interest, (PQ) 393
Concorde: cost to date, (PQ) 637; *landing rights in the* US, (PQ) 328, (PQ) 392; lands in New York, 378; operating losses 1975-77, (PQ) 552; starts operation on London to Singapore route, 540
HS146: statement on its future, (PQ) 328
HS748 Coastguarder: exports, (PQ) 554
Aircraft noise
Insulation grant scheme, (PQ) 328
Aircraft noise—*continued*
Minimum noise route at Heathrow, (PQ) 223
Mole Valley routes: continuation of experimental dispersal, (PQ) 432; government statement, 211; response to report on the route, (PQ) 328
Sleep disturbance from aircraft noise to be reduced, 319
Airports
(*see also* Aircraft noise)
Expenditure on civil airfields 1964-77, (PQ) 634
London
Gatwick: bridge and entrance building finished, 166
Heathrow: low power/low drag trial, (PQ) 495; pedestrian subway inter-connecting the three air terminals opened, 134; use of minimum noise route, (PQ) 223
Passengers using Scottish airports, (PQ) 496
Regional airport development, (PQ) 632
Security
Airport security system developed, 73
Aviation security levy announced, 379; rate confirmed, (PQ) 432
Foreign airports, (PQ) 390
Palma airport, (PQ) 429
Policing of Airport Act: compensation arrangements agreed, 3
White paper on airport strategy, (PQ) 497, (PQ) 634
al-Otaiba, Mana Saeed
see Otaiba, Mana Saeed al-
Algeria
EEC/Algeria trade agreement on olive oil, 334
All Purpose Machines and Plant Ltd
Develop compact solvent recovery plant, 219
Allied London Properties
Merger not referred to MMC, 118
Allsopp, Michael
Survival in Business, (BN) 322
Amalgamated Industrials Ltd
Merger not referred to MMC, 66
American Petroleum Institute
Proceedings of the 1977 Oil Spill Conference (Prevention, Behaviour, Control, Cleanup) Held at New Orleans, Louisiana, 8-10 March 1977, (BN) 547
American Standard Incorporated
Merger not referred to MMC, 66
Amicon Ltd
Develop microconcentrator, 19
Amusement machines
Exhibitions and fairs: New Orleans, 584
Anderson, I. G.
Councils, Committees and Boards: a handbook of advisory, consultative, executive and similar bodies in British public life, (BN) 386
Anguilla
New customs tariff, 280
Animal feeding stuffs
see Agriculture
Anshaw Instruments
Develop diamond wire saw to avoid crystal damage, 324
Anti-dumping
Actions against Spanish steel suspended, 505
Cases investigated since 1 July 1977, (PQ) 224
Duties: *cycle chains from Taiwan amended, 569, (correction,* 13 January 1978, page 56); unwrought magnesium from USSR revoked, 268
EEC investigations: bearings housings from Japan, 332; iron and steel tubes from Spain, 437; piezoelectric quartz crystal units from Japan, 396
Antigua
Import licensing: changes, 239
Apples
see Food
Appointments
see Public appointments
Arab boycott of Israel
see Foreign trade, UK
Arab countries
see Middle East
ARC Europa Ltd
Develop attendance recording unit, 173
Architects
MMC report on scale fees, 318
Argentina
Import duties: changes, 32, 195, 648; tractors, 94
Import regulations: spirits, 588
Seminar: doing business in Argentina, 131
Transfer of technology law, 280
Arts
(see also Design)
A Salute to British Genius, (BN) 172
Assistance to industry
see Industry – government assistance; Regional *development*
Assisted areas
see Regional development
Associated Fisheries Ltd
Merger not referred to MMC, 425
Association of Building Component Manufacturers
Seminar: transporting materials and components to the Middle East, 269

Trade and Industry
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1978

Association of Natural Rubber Producing Countries
Proposal for commodity agreement for natural rubber, (PQ) 222
Associations
Councils, Committees and Boards: a handbook of advisory, consultative, executive and similar bodies in British public life, (BN) 386
Atomic energy
(*see also* United Kingdom Atomic Energy Authority)
EC Commission's open discussions on nuclear energy, 394
Energy plans must include nuclear power, (Sp) 117
Joint European Torus (JET): Culham site chosen, 161; description of project, (LA) 220; management set-up, 220; site decision imminent, 113
Auclert, André
Outlines procurement procedures of the fourth European Development Fund, (LA) 39
Auctions
Government surplus stores for sale by auction (*Published in all numbers*)
Audio systems
see Domestic equipment
Auditing
see Accountancy
Austin Beech Ltd
Develop heavy-duty pneumatic cylinders, 386
Australia
Agricultural trailers: inquiry to establish normal UK value, 32
Cloth dusters: inquiry to establish normal UK value, 352
Hints to Businessmen, revised edition, 23
Import duties: agricultural wheeled tractors, 455; ceramic tableware, 455; glucose and glucose syrups, 511; harvesters, 94; internal combustion piston engines and parts, 588; potatoes and processed potato products, 239; stranded wire of copper and insulated electric wire, 282; transformers and inductors, 588; vehicle tyres, 195; whisky and brandy, 33, 195
Import licensing: fixed resistors, 455
Import regulations
Tariff quotas: bench or pedestal drilling machines, 511; clothing, 510; footwear, 510; textiles, 510; yarn and fabric, 511
Industries Assistance Commission
Draft reports: ball and roller bearings, 32
Inquiries: confectionery, 135; fixed resistors, 455; hoists, pulley tackle and winches, 511; inks, 280; miscellaneous industrial machinery, 32; primage duties, 404; razors, razor blades, 648; ships, boats and other vessels, 280; tin ores and concentrates, 588; vehicle tyres, 195
References: chemical products, 94; copper ores and concentrates, 280; products of the printing industry, 280
Reports: metal working machine tools, 404; passenger motor vehicles, 135; polyethylene coated paperboard, 352
Temporary protection: cassettes, 32; chain hoists, etc, 94; hosiery, 32; luggage, 239; plywood and hardboard, 94; refrigeration compressors, 404; spanners, 32; spectacle and sunglass frames, 94; timber, 282; works trucks, 135
Austria
Double taxation protocol signed, 444
Import duties: duty-free quota for paper and paperboard exhausted, 135, 648; paper and paperboard, 648
Temporary importation of commercial samples, 282
Automated Production Ltd
Develop fast screwdriver, 219
Automobile Association
Subscriptions and charges, (PQ) 636
Avdel Ltd
Develop fastener for GRP panels, 173
Avel-Lindberg Ltd
Develop emergency power supply system, 19
Aviation security levy
see Airports – Security
Ayrshire Metal Products Ltd
Develop prefabricated office partitions, 387

B

Babcock and Wilcox
Exhibit at Machine Asia Exhibition, 507
Baby carriages
see Perambulators and pushchairs
BAC
see British Aircraft Corporation
Bacon
see Food
Bedalex Ltd
Export orders secured, 354
Bahrain
Exempt companies, 455
Hints to Businessmen, revised edition, 268
Baker Perkins Ltd
Visit by Sir Frederick Catherwood, 27
Balance of payments
Current account of the United Kingdom balance of payments, (ST): 1977, Sept, 140; Oct, 369; Nov, 659; 3rd qtr, 602
The economy – selected indicators (*Published in all numbers*)
Balance of Payments—*continued*
Estimates of 'oil-adjusted' visible balance, (PQ) 327
1977 to date, (PQ) 631
UK figures since 1945, (PQ) 393
Bamford (J. C.) Excavators Ltd
Develop telescopic handler, 173
Bananas
see Food
Bank of Scotland
UK Refining and Petrochemicals: Facts and Opportunities, 22
Banking
Bank charges: Price Commission examination, 117, (PQ) 224
Banks and the British Exporter: based on the seminar held at Christ's College, Cambridge, 11-16 September 1977, (BN) 428
Protection of Depositors Act: companies treated as banking or discount companies, 171
Bankruptcy
Insolvencies in England and Wales, (ST): 1977, 3rd qtr, 248
Insolvency Act 1976: provisions become effective, 4
Voluntary liquidations for year ending 30 September 1977, (PQ) 330
Barbados
Consumption tax: increases, 33
Import licensing: changes, 94; mashed potato, 512; skirts, 512; tyres, 33
Batteries
Battery vehicles *see* Motor industry – Electric vehicles
Price increases, (PQ) 496
Battery vehicles
see Motor industry – Electric vehicles
BBC
see British Broadcasting Corporation
Beaconet Equipment (Sales) Ltd
Wins 1977 TDC Innovator Award, 70
Beauprez, Richard
Life-Cycle Costing in the Management of Assets: a practical guide, 544
Beef
see Food
Beer
see Brewing industry
Begin, Menachem, Prime Minister of Israel
To visit UK, 180
Belgium
Brussels fashion trading complex under construction, 508
Economic indicators of the industrial countries, (ST): 41, 244, 461
Excise duties: cigarettes, 239
Food regulations, 455
Hints to Businessmen, revised edition, 129
Measures to protect textile and clothing industries, (PQ) 555
VAT on cigarettes, 352
Belzona Molecular Metalife Ltd
Develop: low temperature metal re-building process, 323; metal maintenance system in one package, 73
Benn, Anthony Wedgwood, Secretary of State for Energy
Announces energy conservation programme, 539
Visits Bacton gas terminals and gasfields, 113
Bennett (Thomas) Ltd
Order sent to Ras Al Khaima, 196
Berisford's Ltd
Holds Export Year lunch at House of Commons, 161
Berkovitch, Israel
Coal on the Switchback: the coal industry since nationalisation (BN) 547
Berridge, Tony
Product Innovation and Development, (BN) 264
Beverages
(*see also* Brewing industry)
Exhibitions and fairs: Brussels, 190
Soft drinks: developments since Price Commission report, (PQ) 633
BICC Ltd
Merger not referred to MMC, 260
Bicycles
see Cycles
'Big Ben'
see National Physical Laboratory
Biochemistry
Production of hydrogen by photobiological energy conversion, 435
Birds Eye Foods Ltd
Discounts undertaking, 539
Birmingham
Visit by Eric Varley, 112
Birmingham Chamber of Industry and Commerce
Export missions: Mauritius, 130
Biscuits
see Food
Bisgood, Bishop and Co Ltd
Merger referred to MMC, 168, 262
Bishop, Edward, Minister of State, Ministry of Agriculture
Addresses: Dairy Trades Federation, (Sp) 177; Food and Farming Conference at Coventry Cathedral, (Sp) 176
Welcomes Soviet delegation, (Sp) 183
Black Diamonds Pensions Ltd
Merger not referred to MMC, 425
Blakeborough (J.) and Sons
Sales manager to visit Gulf States, 86
BLMC
see British Leyland Ltd
Board
see Paper
Boats
(*see also* Shipbuilding)
Danger warnings on inflatable dinghies, (PQ) 224
Electroplated diamond router developed, 22
Exhibitions and fairs: Annapolis, 273; Chicago, 91, 132; Genoa, 274; Hamburg, 274; Southampton, 27
Book reviews
Banks and the British Exporter: based on the Seminar held at Christ's College, Cambridge, 11-16 September 1977, 428
The Biscuit Market in the UK, 18
Bring Your Own Towel: a guide to residential conference centres, 172
The Bulk Buy Book, 628
Bulletin of Statistics on World Trade in Engineering Products 1975, 172
Coal on the Switchback: the coal industry since nationalisation, 547
Collective Bargaining and Inflation: new relations between government, labour and management: final report on international management seminar, 72
Commonwealth Organisations: a handbook of official and unofficial organisations active in the Commonwealth, 428
Computerguide 13: production control implementation, 488
The Confederation of British Industry, 264
Consumer Information Systems and Consumer Policy, 628
The Consumer Movement and the Consumer, 628
Consumer Protection in the field of Consumer Credit, 628
The Consumer Society, 18
Confectionery in France, 18
Confectionery in the Federal Republic of Germany, 18
Councils, Committees and Boards: a handbook of advisory, consultative, executive and similar bodies in the British public life, 386
Cutting Energy Costs, 547
The Economists, 488
Employee Participation: current practice and future intentions, 72
Exporting to the Federal Republic of Germany, 488
Fault Diagnosis in Data Communications, 488
Foundrymen's Views: an attitude study in the ferrous foundries industry, 264
Guide to World Commodity Markets, 428
Health and Safety Literature: a selective list of materials held by the SRL, 386
Japanese Corporate Finance 1977-1980, 264
Lloyds Calendar and Nautical Yearbook, 386
Management Characteristics and Labour Conflict: a study of managerial organisation attitudes and industrial relations, 18
Methodology of Concentration Analysis Applied to the Study of Industries and Markets, 386
Motor Distributors BLMC, 120
Motor Distributors Ford, 120
Motor Distributors Miscellaneous, 120
Night Work, 72
The Offshore Service Vessel Register 1977, 172
People at Work, 72
Petroleum and the Economy of the United Arab Emirates, 547
Policy-Making in the European Communities, 428
Proceedings of the 1977 Oil Spill Conference held at New Orleans, Louisiana, 8-10 March 1977, 547
Product Innovation and Development, 264
Protection of Workers Against Noise and Vibration in the Working Environment, 72
The Publishing Industry in Canada: a report, 264
Recommendations for the Design and Construction of Concrete Sea Structures, 488
The Rise of Big Business, 322
A Salute to British Genius, 172
Starting and Running a Small Business, 322
Structural Problems of the Textile and Clothing Industry, 386
A Study of the Evolution of Concentration in the Electrical Appliances Industry, 386
Survival in Business, 322
Women at Work, 72
Work Revolution, 72
Working Abroad: The Daily Telegraph guide to working and living overseas, 322
Books
Exhibitions and fairs: Frankfurt, 276
Price Commission examination, 117
Borrie, Gordon, Director-General of Fair Trading
Addresses seminar, (Sp) 3
BOTB
see British Overseas Trade Board
Boughton (T. T.) and Sons Ltd
Develop winch for Post Office, 491
Bowser Engineering Ltd
Develop rough terrain lift truck, 489
BPB Industries Ltd
Supply of plasterboard, 483, 543
Bradford Chamber of Commerce
Export missions: North America, 182
Brazil
Import duties: absorbent paper, 96; acrylic fibre products, 404; acryllonitrile butadiene styrene, 456; agricultural chemicals, 135, 282; aluminium oxide, 135; aluminium sheet and foil, 404; azo-
continued

Brazil—*continued*
di-carbonamide, 239; bovine meat, 456; calcium *chloride, 455; camphene, 588; chemicals, 282;* concentrated lead ore, 455; cuprous cyanide, 195; disposable haemodialysing units for artificial kidney *machines, 136; dredgers, 455; ion exchangers, 96;* melted bovine cattle fat, 135; methylmorphine (codeine), 456; mixtures of primary aliphatic *alcohols, 195; morphine, 404; parts for automatic* control apparatus, 136; prior deposit exemptions, 96; raw coffee beans, 136, 512; raw materials for *agricultural chemicals, 135; sensitized aluminium* sheet, 512; silos, 282; threo – 1-p-nitrophenyl-2-amino-1,3-propanodiol, 456
Import regulations: chrome, and iron and steel products containing chrome, 404
Manufactured goods tax: changes, 136, 512
Reference prices: aerosol valves, 588; aluminium powder, 96; circular saw blades, 588; common gammaglobulin, 96; diodes, 96; harvester blades, 282; polyurethanes, 588; tennis racquets, 135; tools, 96
Bread
see Food
Brewing industry
Beer Prices and Margins (Price Commission Report no. 31): discussions on the report, 625
British Aerospace
Auditors appointed, (PQ) 330
Board members, (PQ) 498
Organisation and structure, (LA) 540
British Aerospace Australia Ltd
Reconstituted from British Aircraft Corporation (Australia) Pty Ltd, 85
British Aircraft Corporation
Electronic and Space Systems Group: awarded space science experiment contract by European Space Agency, 125; awarded space telescope contracts by NASA, 64, 325; to study spacelab telescope, 22
British Aircraft Corporation (Australia) Pty Ltd
Reconstituted as British Aerospace Australia Ltd, 85
British Airways
Civil aviation licences granted, 212
Financial targets, (PQ) 635
Future aircraft requirements, (PQ) 498
Operating losses on Concorde, (PQ) 552
Sales campaign launched, 509
British Broadcasting Corporation
French and German programmes on EEC, 500
British Caledonian Airways Ltd
Celebrates start of Houston service, 211
Civil aviation licences granted, 212
British Chamber of Commerce, France
Conference: The Channel – trade barrier or bridge?, 24
British Electronic Controls Ltd
Merger: reference laid aside, 425; referred to MMC, 212
British Institute of Management
Spur campaign: seven organisations sign joint statement, 625
British Investment Trust Ltd
Merger not referred to MMC, 425
British Island Airways Ltd
Civil aviation licences refused, 212
British Leyland Ltd
Accepts resignation of Sir Richard Dobson as chairman, 162
Announces formation of four subsidiary companies, 382
Chairman appointed, 160
Corporate plan, (PQ) 494
Motor Distributors: BLMC, (BN) 120
NEB: financial duties, (PQ) 497; loan, 4
Progress of Mini replacement programme, (PQ) 391
Research and development facilities in bus and truck group, (PQ) 636
Rover 2300 and 2600: models introduced, 164; investment to manufacture engines, 424
British Library
Health and Safety Literature: a selective list of materials held by the SRL, (BN) 386
British Olivetti Ltd
Merger not referred to MMC, 544
British Overseas Trade Board
Annual Report 1977: published, 538; summary, (LA) 578
Appoints special advisor on Japan, 397
Assistance for overseas market research projects in 1977, 23
British Commercial Representation Overseas, (*insert*, 28 October)
Conference: Exporting to Western Europe 1977, 2, (*insert*, 25 November), (Sp) 419, (*correction*) 437
Expenditure on export promotion, (PQ) 635
Exports to Japan Unit: objectives and organisation, 271
The Japanese Market for Combustion and Heat Treatment Equipment: report, 269
North American Advisory Group: chairman appointed, 641
Programme of trade promotions Oct-Dec 1977, 85; 1977-79, (*insert*, 14 October)
British Rail
Environmental panel appointed, 384
Expansion planned for Motorail, 278
Price Commission investigation, 258, (PQ) 430; fare increases limited to 20 per cent, 321
Transmark Ltd to help reorganise Egyptian railways, 335
British Resorts Association
Seaside and spa resorts need to define their present *role, (Sp)* 319
British Shipbuilders
Auditors appointed, (PQ) 330
Board members, (PQ) 498; member appointed, 384
UK/Poland shipbuilding contract: agreement signed, 378; almost signed, 2; constitution, (PQ) 554; effect *on public sector borrowing requirement, (PQ) 496;* engines supply, (PQ) 496; government assistance, (PQ) 330; government subsidy, 539; items from *Poland, (PQ) 497;* name of Polish State Holding Co, (PQ) 498; orders re-allocated, 418
Value of orders, 112
British-Soviet Chamber of Commerce
President appointed, 182
British Standards Institution
Short Guide to International Organisations Concerned with Standards, 448
Technical Help to Exporters: assistance offered to UK manufacturers exhibiting at Interpack 78 in Dusseldorf, 279; electrical regulations for Norwegian ships, 509; *Household Electrical Appliances – an EEC Survey,* 126
British Steel Corporation
Capital requirements 1977-78, (PQ) 391
Cash limit 1977-78, (PQ) 327
Effect of EEC membership, (PQ) 552; grants received and levies paid, (PQ) 552
European Investment Bank loan, 332
Financial targets, (PQ) 636
Imports of scrap steel and iron, (PQ) 390
New heavy steel foundry complex commissioned, 266
Problems discussed by ministers and TUC steel committee, 418
Visit by Eric Varley to Port Talbot works, 162
British Tourist Authority
see Tourist trade
Britralipon Ltd
Merger not referred to MMC, 425
Brown Lenox and Co Ltd
Develop new range of jetty hooks, 124
Brunei
Hints to Businessmen, revised edition, 640
Brussels
see Belgium
Brussels tariff nomenclature
see Export trade procedure – Customs Co-operation Council Nomenclature
Bryan, Sir Arthur
Appointed chairman of BOTB's North American advisory group, 641
BSO
see Business Statistics Office
BTR Ltd
Develop rubber de-icer overshoe for radomes, 267
Buckley, Sir John
Appointed president British-Soviet Chamber of Commerce, 182
Budget
see Economic policy
Building Centre Group
Joint venture with BOTB at Tokyo International Anti-Pollution Exhibition, 24
Building industry
see Construction industry; Industrial building
Building materials
Exhibitions and fairs: Tokyo, 644
Fully-automated plants for producing glass-reinforced cement sheets developed, 326
MMC reference on ceramic sanitaryware extended, 544
Supplies of plasterboard, 483, 543
Building Research Establishment
Ventilation requirements (BRE Digest 206), 75
Bulgaria
Visa regulations, 33
Bull Motors (Ipswich) Ltd
Shares acquired by NEB, 116
Burundi
Industrial property convention, 239
Business Co-operation Centre
see European Communities
Business Statistics Office
Costs, staffing and surveys undertaken, (PQ) 433
Inquiry into Retail Trading for 1976, (PQ) 224, (PQ) 327; (PQ) 433
Staff employed and wage costs, (PQ) 223, (PQ) 389
Butter
see Dairy products

C

CAA
see Civil Aviation Authority
Cabs
see Road transport
Cadbury Schweppes Foods Ltd
Price Commission investigation, 486; price increases allowed, 626
Calderdale Metropolitan District
Government assistance, (PQ) 432
Callaghan, James, Prime Minister
Discusses Spain's EEC membership application with Adolfo Suarez, 176
Opens new section of M4 motorway, 113

Trade and Industry Index

Volume 29 October to December 1977

Issue paging and dates

1— 60	7 October 1977
61—110	14 October 1977
111—158	21 October 1977
159—206	28 October 1977
207—254	4 November 1977
255—310	11 November 1977
311—376	18 November 1977
377—416	25 November 1977
417—480	2 December 1977
481—536	9 December 1977
537—616	16 December 1977
617—672	23-30 December 1977

Callaghan, James—*continued*
Speech at Lord Mayor's banquet, 394
Statement on UK French talks, 538
Visits West Germany, 77
Camel of Cornwall Ltd
Develop trailer mounted vetro-jet drain cleaner, 324
Camping equipment
Exhibitions and fairs: Cologne, 90
Canada
Anti-dumping investigation: valves, 588
Consumer packaging and labelling regulations, 282
Economic indicators of the industrial countries, (ST): 41, 244, 461
French language policy in Quebec province, 26
Import regulations: clothing quotas, 282; footwear quotas, 512
The Publishing Industry in Canada: a report, (BN) 264
Canning House
Seminar on Mexico, 86, 228
Canoes
see Boats
CAP
see Agriculture – EEC Common Agricultural Policy
Capital expenditure
The economy – selected indicators: fixed capital expenditure (*Published in all numbers*)
Manufacturing, distributive and service industries, (ST): 1977, 3rd qtr, (provisional) 470, (revised) 619
Caravans
Export services, 403
Static caravan owners, (PQ) 496
Cargo
see Transport
Caribbean
Insight: new monthly bulletin on the Caribbean, 131
Carliol Investment Trust Ltd
Merger not referred to MMC, 384
Carpentier, J.
Night Work, (BN) 72
Carpets
see Floorcoverings
Catering trades
(*see also* Hotels)
Exhibitions and fairs: Basle, 507; Malmö, 191
Index nos of turnover, (ST): 1977, 3rd qtr, 363
Service charges code, (PQ) 430
Catherwood, Sir Frederick, Chairman of British Overseas Trade Board
Addresses: BOTB conference Exporting to Western Europe 1977, (Sp) 419; British Institute of Management, Wolverhampton branch, (Sp) 229; E Midland Economic Planning Council, (Sp) 502; Export Clubs luncheon, 639; Northern Ireland export conference, (Sp) 181
Visits Baker Perkins Ltd, 27
CAV Ltd
Develop fuel injection pump, 20
Cave Wood (Transport) Ltd
Organise course on freight forwarding, 24
Cayman Islands
Import duties: gasolene and diesel, 648
Cazamian, P.
Night Work, (BN) 72
CBD Research Ltd
Councils, Committees and Boards: a handbook of advisory, consultative, executive and similar bodies in British public life, (BN) 386
CBI
see Confederation of British Industry
CCAB
see Accountancy – Consultative Committee of Accountancy Bodies
Celestion Industries Ltd
Merger not referred to MMC, 384
Celtite (Selfix) Ltd
Develop position ring for tube foundation bolts, 387

Cement
see Construction industry
Cement and Concrete Association
Recommendations for the Design and Construction of Concrete Sea Structures, (BN) 488
Census of distribution
see Distribution
Centre for International Briefing
Seminars: doing business in Argentina, 131; new business opportunities in China, 131
Centre National de la Recherche Scientifique
Solar energy research programme, 22
Ceramics
Health and Safety Commission: ceramics industry advisory committee established, 627
Safety in the Operation of Ceramic Kilns, 549
CETA
see Conference of Engineering Trade Associations
Chamberlain Plastics Ltd
Develop plastic trim for cars, 630
Cheese
see Dairy products
Chemical industry
Activity in the chemicals industry, (ST): 1977, 2nd qtr, 48
Chemical business news service, 22
Compact solvent recovery plant developed, 219
EEC loans, (PQ) 633
Exhibitions and fairs: Bucharest, 277; Singapore, 183
Granular activated carbon to purify acidic solutions developed, 74
Seminar on major chemical hazards, 75
Chemviron Ltd
Develop granular activated carbon to purify acidic solutions, 74
Chile
Exchange rates, 136, 404, 648
ECGD cover, (PQ) 390
Chilecrest Ltd
Develop fibre optic light guide, 20
China (People's Republic)
Seminar: on new business opportunities in China, 131
UK visit by Chinese trade minister, 419, 639
UK/China agreement on ships' technical survey and classification, 446
Chloride Technical Ltd
Develop high energy battery, 163
Chloride Transipack Ltd
Develop static inverters for equipment manufacturers, 265
Christopher, Martin
Distribution Planning and Control: a corporate approach, (BN) 120
Chrysler UK Ltd
Develop electric-powered delivery van, 163
Government aid, (PQ) 391
Citizens' Advice Bureaux
see National Association of Citizens' Advice Bureaux
Civil aviation
see Air transport
Civil Aviation Authority
(*see also* Air fares)
European Air Fares: a discussion document, 383
Low power/low drag trial at Heathrow, (PQ) 495
Civil aviation licences
Applications: Aer Lingus, (PQ) 497
Applications granted: British Airways, 212; British Caledonian Airways Ltd, 212
Applications refused: British Island Airways Ltd, 212; Dan-Air Services Ltd, 212
Skytrain frequency restriction removed, 7
Civil engineering
(*see also* Construction industry; Contractors plant and machinery)
M4 motorway sections opened and inaugurated, 113
New earnings high for British builders overseas, (LA) 231, (*correction*) 269
Civil service
Improving understanding between industry and the civil service, (Sp) 114
Clarkson (H.) and Co Ltd
The Offshore Service Vessel Register 1977, (BN) 172
Clayton Dewandre Holdings Ltd
Merger not referred to MMC, 66
Cleaning equipment
Tack cloth developed, 73
Trailer mounted vetro-jet drain cleaner developed, 324
Clothing
(*see also* General Agreement on Tariffs and Trade; Hosiery; Knitwear)
Clothing Industry Scheme: applications received to mid-Nov, (PQ) 492, (PQ) 496
Exhibitions and fairs: Baghdad, 638; Cologne, 93, 192; Munich, 238; New York, 235; Paris, 133, 347
Import licensing *see* Import licensing
Made-up clothing: orders and deliveries, (ST): 1977, July, 107; Aug, 364; Sept, 668
School uniforms: effect of Price Commission report, (PQ) 635
Silk clothing imports from Hong Kong, (PQ) 434
Structural Problems of the Textile and Clothing Industry, (BN) 386
Clwyd
Development area status, (PQ) 492
CNRS
see Centre Nationale de la Recherche Scientifique
Coal
(*see also* European Coal and Steel Community; Mining; National Coal Board)
Coal—*continued*
Coal on the Switchback: the coal industry since nationalisation, (BN) 547
Imports from Poland, (PQ) 330
Price Commission investigation into 14 coal distributors in west Wales, 208
Research and development projects under consideration, (Sp) 166
Coastguard, HM
Cost of coastguard service, (PQ) 393
Coastguarder
see Aircraft – HS 748 Coastguarder
Coca-Cola Export Corporation
New plant opened at Milton Keynes, 211
Collective bargaining
see Industrial relations
Colmant et Cuvelier SA
Merger not referred to MMC, 168
Colombia
Import licensing: automobile engines, 588; changes, 96
Colombo, Emilio, President of The European Parliament
Receives UK assurances on direct elections, 395
Colt International Ltd
Develop smoke and fume exhaust ventilator, 219
Comid Engineering Ltd
Develop valve reclamation techniques, 76
Commercial Representatives, British
British Commercial Representation Overseas, (*insert,* 28 October)
Committee to Review the Functioning of Financial Institutions
Progress report, (LA) 620
Commodities
(*see also* United Nations Conference on Trade and Development – Common Fund)
Guide to World Commodity Markets, (BN) 428
Raw material costs, (PQ) 430
Common Agricultural Policy
see Agriculture
Common customs tariff
see Import duties, EEC
Common Fund
see United Nations Conference on Trade and Development
Commonwealth
Commonwealth Organisations: a handbook of official and unofficial organisations active in the Commonwealth, (BN) 428
New forum for Commonwealth merchant shipping proposed, 379
Commonwealth Secretariat
Commonwealth Organisations: a handbook of official and unofficial organisations active in the Commonwealth, (BN) 428
Compair Industrial Ltd
Develop compressors with integral aftercooler, 548
Companies
(*see also* Bankruptcy; Companies Registration Office; Insurance; Mergers; Small firms *and entries under the names of companies*)
Authorisation of company investigations, (PQ) 393
Companies in 1976:Department of Trade's annual report, 2
Company accounts: late filing, (PQ) 329
Company inspectors and inspectorate, (PQ) 393
Company investigations: companies listed in Fay Report on the Crown Agents, (PQ) 631
Company law proposals and proprietary companies, (PQ) 327
Company law reform, (PQ) 327
Competition Law in the European Community, 77
The Conduct of Company Directors, (LA) 420; proposed legislation, 418
Definitions of public and private companies, (PQ) 631
The Future of Company Reports: conference held to discuss paper, (Sp) 208
Insurance companies investments and assets, (ST): 1976, 298
Liability of partners, (PQ) 550
Limited company voting members, (PQ) 497
Multinational companies and the EEC, (PQ) 632
New companies registered, (ST): 1977, Sept, 105; Oct, 365; Nov, 658
New companies registered 1975-76, (PQ) 553
New companies registered in Northern Ireland, (ST): 1977, Aug, 56; Sept, 306; Oct, 477
Number wound up 1967-77, (PQ) 389
Official returns required, (PQ) 224
Powers authorising individuals to act as auditors to end, 258
Pre-tax trading profits, (PQ) 329
Response to EEC directive on public company designation, (PQ) 552
The Rise of Big Business, (BN) 322
Scottish company records to be microfilmed, 257
Second directive on company law, (PQ) 637
Survey of company liquidity, (ST): 1977, 3rd qtr, 532
Survival in Business, (BN) 322
Winding-up procedure, (PQ) 389
Companies Registration Office
Postal inquiry service, (PQ) 432
Registry of Business Names: applications received and fees charged, (PQ) 329
Competition
(*see also* EEC – rules of competition; Monopolies and Mergers Commission)
Competition Law in the European Community, 77
Competition—*continued*
Competition policy group: membership and scope of review, (PQ) 555; report due Spring 1978, 418
Compressed air
Compressors with integral aftercooler developed, 548
Computer Aided Design Centre
Graphically checked numerical-control tapes and other services offered, 490
Computers
Computerguide 13: production control implementation, (BN) 488
Computerised die store developed, 52
Computerised equipment to analyse blood samples developed, 388
Design: layout planning technique seminar, 326
Easy-to-use computer display terminal developed, 629
EEC survey on Cobol compatibility, 395
Exhibitions and fairs: Munich, 273
Fault Diagnosis in Data Communications, (BN) 488
Future industrial strategy, (PQ) 433
Government computing needs, (PQ) 434
Graphically checked numerical-control tapes and other services, 490
Interim Report of the National Committee on Computer Networks, 160
Microcomputer-based automatic test and fault-finding equipment developed, 125
Range of computer stationery developed, 74
Concorde
see Aircraft
Concrete
see Cement and Concrete Association; Construction industry
Confectionery
Confectionery in France, (BN) 18
Confectionery in the Federal Republic of Germany, (BN) 18
Confederation of British Industry
Competition Law in the European Community, 77
The Confederation of British Industry, (BN) 264
Seminar: Export finance – the short end, 24, (Sp) 229
Conference facilities
Bring Your Own Towel: a guide to residential conference centres, (BN) 172
Conference of Engineering Trade Associations
Establishment, 383
Construction industry
(*see also* Building materials; Building Research Establishment; Civil engineering; Contractors' plant and machinery)
Association of Building Component Manufacturers: seminar on transporting materials and components to the Middle East, 269
Effect of increased construction work expenditure on pipe manufacturing industry, (PQ) 493
Exhibitions and fairs: Singapore, 2, 276
Information Sources on the Cement and Concrete Industry, (BN) 18
Invisible earnings, (Sp) 397
Moisture measuring system developed, 548
New earnings high for British builders overseas, (LA) 231, (*correction*) 269
Position ring for tube foundation bolts developed, 387
Consultative Committee of Accountancy Bodies
see Accountancy
Consumer Advice Centres
see Consumer protection
Consumer Councils
see Electricity; Gas; National Consumer Council
Consumer credit
see Credit
Consumer protection
(*see also* Department of Prices and Consumer Protection; Electricity; Gas; National Consumer Council; Office of Fair Trading)
Basingstoke consumer group makes third price survey, 485
The Bulk Buy Book, (BN) 628
Consumer advice centres: government grants 1977-78, (PQ) 632; new grants available, 379, 419; operating costs, (PQ) 554; visit to S Yorkshire's centres by Robert Maclennan, 382
Consumer Credit Act *see* Credit
Consumer Information Systems and Consumer Policy, (BN) 628,
The Consumer Movement and the Consumer, Christina Fulop, (BN) 628, (*correction* 13 January 1978, page 52)
Consumer Protection Advisory Committee: members appointed, 320
Consumer voice must exert proper influence in Europe, (Sp) 543
Consumers' Association: research into advertising standards, 379
Euroshoppers should learn from each other, (Sp) 437
Order to ensure consumers know status of sellers of goods, 379
Trade descriptions: prosecutions under Trade Descriptions Act, (PQ) 636
Unfair Contract Terms Act, 1977 *see* Contracts
Unsolicited goods: law relating to, (PQ) 633; solicitations looking like invoices, (PQ) 632
Consumer Protection Advisory Committee
see Consumer protection
Consumers' Association
see Consumer protection
Consumption
The Consumer Society, (BN) 18

Contact lenses
see Medical equipment and supplies
Container transport
see Transport
Contractors plant and machinery
(*see also* Materials handling)
Exhibitions and fairs: Bucharest, 277
Mobile vehicle maintenance workshop developed, 324
Mobile wages office developed, 265
Rough terrain lift truck developed, 489
Contracts
Institute of Purchasing and Supply conference on the buyer and the law, 627
Stop and Think: guide to contracts, 419
Topical Aspects of Overseas Contracts and Major Engineering Projects, 647
Unfair Contract Terms Act 1977: government statement, 210; implications for business insurance, (Sp) 421; liability of partners, (PQ) 550
Conveyors
see Materials handling
Cooke (Henery) Ltd
Papermaking productivity increased by new machine, 318
Co-operative Bank
Incentive grant for Co-op bank project in Skelmersdale, 314
Co-operative Development Agency
see Co-operatives
Co-operatives
Co-operative Development Agency: establishment, (PQ) 329
Report of the Working Group on a Co-operative Development Agency, 162
Copyright
(*see also* Patents)
Copyright (International Conventions) (Amendment No 4) Order 1977, (SI) 230
Corrosion
Controlling Corrosion: Monitoring, 325
Controlling Corrosion: Specifications and Standards, 325
Export services, 134
Seminar on avoidable costs of corrosion, 435
Cosmetics
Cosmetic products regulations proposed, 210
Costa Rica
Hints to Businessmen, revised edition, 23
Costain (Richard) Ltd
Merger not referred to MMC, 118
Cotton
(*see also* Textiles)
Commodity agreement for cotton, (PQ) 222
Production, (ST): 1977, Aug, 365; Sept, 477
Court Line
Cost of government purchase, (PQ) 392
Cox and Wright (Pneumatics) Ltd
Develop electro-hydraulic swing-arm cutting press, 20
Cranes
see Materials handling
Credit
(*see also* Export credit; Export Credits Guarantee Department)
Consumer Credit Act: persons to hear appeals appointed, 384
Consumer Credit Act 1974 (Commencement No 3) Order 1977, (SI) 6
Consumer Protection in the Field of Consumer Credit, (BN) 628
Credit cards' rates of interest, (PQ) 224
Credit control for a small manufacturer, 259
Hire-purchase and other instalment credit business, (ST): 1977, Aug, 57; Sept, 297; Oct, 517
Hire purchase debt, (PQ) 550
Crown Agents
Fay Committee report: companies investigated by Department of Trade, (PQ) 631; government statement, 486
Further inquiry, 486, 543
Crusader Manufacturing Ltd
Becomes 25 000th client of the Luton Small Firms Information Centre, 258
Cryer, Robert, Parliamentary Under-Secretary, Department of Industry
Opens: Corby Development Corporation Jubilee Enterprise exhibition, 421
Receives 25 000th small firm inquiry, 258
Cuba
Transmission of mail, 96
Cunningham, Dr John, Parliamentary Under-Secretary, Department of Energy
Addresses: Royal Institution forum, (Sp) 117
Customs and Excise, HM
Customs additional code to be inserted, 85
End-use relief: changes in procedure, 131
Metrication of excise duties on hydrocarbon oil, petrol substitutes, power alcohol and gas, 424
New import entry and boarding procedures, 84
Review of customs arrangements for the control of international general aviation announced, 335
Customs Co-operation Council Nomenclature
see Export trade procedure
Customs documents
see Export trade procedure; Import regulations, EEC; *and under individual countries*
Customs duties
see Import duties, EEC; Import duties, UK *and under individual countries*
Cutlery
Production, sales and exports 1973-77, (PQ) 493
Stainless-steel cutlery production, (PQ) 493
UK imports 1973-77, (PQ) 493; 2nd qtr 1977, (PQ) 389
Cycles
Exhibitions and fairs: Milan, 644
Motor cycles: safety chest pad developed, 74
Cyprus
Import regulations: petroleum products, 96

D

Daily Telegraph
Working Abroad: the Daily Telegraph guide to working and living overseas, (BN) 322
Dairy products
(*see also* Agriculture–EEC Common Agricultural Policy)
Butter: imports 1976 and 1977, (PQ) 429
Butter and cheese: EEC ministers agree price increases for NZ shipments, 36
Future of dairy production and milk marketing boards within the EEC, (Sp) 177
Milk subsidy: increase, (PQ) 636
Dan-Air Services Ltd
Civil aviation licences refused, 212
Danks Technical Services Ltd
Develop range of industrial grabs, 74
Data transmission
see Telecommunications
Davair Heating Ltd
Develop industrial space heater burning waste engine oil, 629
Davis, Stanley Clinton, Parliamentary Under-Secretary, Department of Trade
Addresses: Industrial Society Conference, (Sp) 208; Intergovernmental Maritime Consultative Organisation meeting, 268
Visits: USSR for shipping talks, 112, (PQ) 327, (PQ) 329
Daystrom Ltd
Develop first constant potential x-ray thickness gauge, 267
De Keyser, Ethel
see Keyser, Ethel de
De Meur Precision Ltd
Manufacture remedial car for young children, 269
Degree day figures
see Fuels
DEK Printing Machines Ltd
Develop system to handle 1200 hybrid circuits an hour, 323
Dell, Edmund, Secretary of State for Trade
Addresses: Association of Building Component Manufacturers, (Sp) 502; Association of Manufacturers of Domestic Electrical Appliances, (Sp) 505; British Caledonian Airways dinner, (Sp) 211; British Food Export council, (Sp) 638; Canning House Mexico seminar, (Sp) 228; conference on European business in world development, (Sp) 208; (LA) 270; General Council of British Shipping, (Sp) 484; Institute of Purchasing and Supply conference, (Sp) 7
Statement on common fund discussions, 569
Denmark
Economic indicators of the industrial countries, (ST): 41, 244, 461
Import regulations: electrical equipment, 512
Seminar to attract Danish investment to UK held, 380
Tax on containers, 648
Visit by John Silkin, 37
Dent and Hellyer Ltd
Develop bench-top sterilisers, 219
Department of Education and Science
(*see also under name of Minister*, ie Oakes, Gordon)
Laboratories Investigation Unit: work and research, 221
Department of Employment
see under name of Parliamentary Under-Secretary, ie Grant, John
Manpower Services Commission *see* Manpower Services Commission
Department of Energy
(*see also under name of Parliamentary Under-Secretary*, ie Grant, John)
Cunningham, Dr John; Eadie, Alex; Mabon, Dr J Dickson)
Fuel consumption tests for new cars, (SI) 64
Report of the Working Group on Energy Strategy (Energy Commission Paper no. 2), 260
Short Term Energy Forecasts 1977-78 (Energy Commission Paper no. 3), 166
Working Document on Energy Policy for the Energy Commission (Energy Commission Paper no. 1), 166
Department of Environment
(*see also under name of Minister*, ie Freeson, Reginald)
Building Research establishment *see* Building Research Establishment
Department of Health and Social Security
(*see also under name of Minister*, ie Ennals, David)
Sponsors development of smoke detector tester, 174
Department of Industry
(*see also under the names of Ministers and Parliamentary Under-Secretaries*, ie Cryer, Robert; Huckfield, Leslie; Kaufman, Gerald; Varley, Eric; Williams, Alan)
Advance factories *see* Industrial building
Business Statistics Office *see* Business Statistics Office
Department of Industry—*continued*
Changes in the Population of Persons with Qualifications in Engineering, Technology and Science 1959 to 1976: report, 161
Committee on Corrosion *see* Corrosion
Costs of official visits to EEC, (PQ) 636
Industrial Development Advisory Board: member appointed, 485
Industrial efficiency and government policy, (LA) 121
Industrial Efficiency and the Role of Government, (BN) 120
Invest in Britain Bureau *see* Investment
National Committee on Computer Networks *see* Computers
National Physical Laboratory *see* National Physical Laboratory
Non-civil service appointments by Secretary of State, (PQ) 494
Seminars: avoidable costs of corrosion, 435; bulk materials handling, 549; efficient use of energy in manufacturing industry, 65
Silica: Mineral Resources Consultative Committee Report, 424
Statement on Fairey Co receivership, 65
Department of Prices and Consumer Protection
(*see also under the names of Ministers and Parliamentary Under-Secretaries*, ie Fraser, John: Hattersley, Roy; Maclennan, Robert)
Costs of official visits to EEC, (PQ) 635
Ministerial responsibility under Scotland bill, (PQ) 494
1977 Firework safety campaign, 160
Non-civil service appointments by Secretary of State, (PQ) 495
Staff employed, (PQ) 497
Department of Trade
(*see also under the names of Ministers and Parliamentary Under-Secretaries*, ie Davis, Stanley Clinton; Dell, Edmund; Meacher, Michael)
Anti-dumping investigations *see* Anti-dumping
Companies in 1976: annual report, 2
Company investigations *see* Companies
Costs of official visits to EEC, (PQ) 635
Export Intelligence Service: Export intelligence – 25 million cards on, (LA) 184; helps win export order for UK firm, 181
Import Duties Act 1958: annual report for year ended 31 March 1977, 572
Ministerial responsibility under Scotland bill, (PQ) 498
Non-civil service appointments by Secretary of State, (PQ) 434
Statement on RTZ Ltd v Westinghouse, 66
Derritron Ltd
Merger: reference laid aside, 425; referred to MMC, 212
Design
(*see also* Computer Aided Design Centre)
Exhibitions and fairs: Lille, 93
Layout: seminar on planning techniques, 326
Developing countries
(*see also* United Nations Conference on Trade and Development – Common fund)
Operating a Trade Information Service: a handbook for developing countries, (BN) 120
Development areas
see Regional development
Devon and Cornwall Development Bureau
Annual grant to promote commercial development in the South-West, 314
Diamond Shamrock Corporation
Merger not referred to MMC, 384
Dick-Larkam, Richard
Cutting Energy Costs, (BN) 547
Dickinson, Bob
Appointed chairman NEB's regional board for the north-west, 539
Dickinson, J. L.
NEB salary, (PQ) 434
Dickson Mabon, Dr J.
see Mabon, Dr J. Dickson
Dickson, Paul
Work Revolution, (BN) 72
Diesel engines
Fuel injection pump developed, 20
Dinghies
see Boats
Direct elections
see European Parliament
Distribution
(*see also* Manufactures; Retail trade; Wholesale trade)
Capital expenditure, (ST): 1977, 3rd qtr, (provisional) 470, (revised) 619
Census of Distribution Advisory Committee: members, (PQ) 494
Distribution Planning and Control: a corporate approach, (BN) 120
Export role for purchasing and supply, (Sp) 7
Manufacturers' and distributors' stocks, (ST):1977, 3rd qtr, (provisional) 472, (revised) 619
Diving
Purpose-built diving support ship, 485
Dobson, Sir Richard
Resigns as chairman of British Leyland Ltd, 162
Domestic equipment
(*see also* Electrical equipment)
Audio systems
Exhibitions and fairs: Osaka, 132
Dominica
Foreign currency levy, 648

Dominican Republic
Hints to Businessmen, revised edition, 640
Doncaster Packaging Ltd
Occupy advance factory at Doncaster, 542
Dorman Smith Holdings Ltd
Merger not referred to MMC, 260
Double taxation
see Taxation
Dowding and Mills Ltd
Carry out metal spraying repair, 21
Down, P. J.
Fault Diagnosis in Data Communications, (BN) 488
Drills
see Machine tools
Drinks
see Beverages; Brewing industry
Drop forging
see Machine tools
Dubai
see United Arab Emirates
Dumping
see Anti-dumping
Dunchurch College of Management
Topical Aspects of Overseas Contracts and Major Engineering Projects, 647
Dunhill, Dr P.
Awarded SRC grant to study effects of processing operations on proteins, 76
Dunlop Ltd
Latex foam agreement with USSR, 65
'You'd be surprised by Dunlop's innovations in industry': exhibition at Design Centre, 116
Dunlop Holdings Ltd
Merger not referred to MMC, 168
Dupont
Investment in N Ireland, 64
Dymo Business Systems
Develop addresser for small businesses, 20
Dyson, John, Commissioner of New York State Department of Commerce
More prosperous future for UK, (Sp) 542

E

Eadie, Alex, Parliamentary Under-Secretary, Department of Energy
Addresses National Coal Board's Coal Research Establishment, (Sp) 166
Visits United States, 180
Earnings
see Pay
Earnshaw, Roy, Export Year Adviser
Addresses Nottinghamshire Chamber of Commerce and Industry, (Sp) 180
East Midlands
Export Year Advisory Committee: work praised by Export Year adviser, (Sp) 180
ECGD
see Export Credits Guarantee Department
Econ Engineering Ltd
Develop fertiliser spreader with 'floating' action, 265
Economic Commission for Europe
see United Nations – Economic Commission for Europe
Economic conditions
Decline of inflation and price increases, (PQ) 434
Economic indicators of the industrial countries, (ST): 41, 244, 461
Economic Trends: summary of contents, 1977, Nov, 595
The economy – selected indicators (*Published in all numbers*)
Single figure inflation in sight, 620
Statistical means of measuring inflation, (Sp) 317
United Kingdom in figures, 102, 204
Economic Development Committee for International Freight Movement
see National Economic Development Office
Economic policy
Autumn budget 1977, 210, (LA) 216
Britain on the brink of an economic breakthrough, (Sp) 502
Decisive turn in pace of inflation: letter to IMF, (LA) 621
EC Commission's proposals to deal with current economic situation, 176
European monetary union debate relaunched, (LA) 286
Statistical means of measuring inflation, (Sp) 317
Economic theory
The Economists, (BN) 488
Edinburgh and Dundee Investment Co Ltd
Merger not referred to MMC, 425
Education
(*see also* Department of Education and Science)
Attitude to industry needs to change, (Sp) 380
Government assistance to support local school/industry links, 540
Importance of co-operation between industry and school, (Sp) 4
National Advisory Council on Education for Industry and Commerce to be wound up, 320
Shaping Tomorrow: conference for north-east, 380
Educational equipment
Exhibitions and fairs: Tehran, 86
Edwards, Michael
Announces formation of four subsidiary companies of British Leyland Ltd, 382
Appointed chairman British Leyland Ltd, 160
EGA Holdings Ltd
Merger not referred to MMC, 168
Egypt
Import duties: alcoholic beverages, 136; changes, 239; knitted fabrics, 512
Transmark Ltd to help reorganise Egyptian railways, 335
El Salvador
Food regulations: registration requirements, 352
Foreign exchange regulations, 514
Electric plugs
see Electrical equipment
Electrical equipment
(*see also* Domestic equipment; Power plant industry)
Fuse prices, (PQ) 390
Introduction of 16A plug and socket system, (PQ) 389
Static inverters for equipment manufacturers developed, 265
A Study of the Evolution of Concentration in the Electrical Appliances Industry: a report, (BN) 386
Electricity
Consultative Councils
London: members appointed, 69
Midlands:chairman appointed, 214; members appointed, 69, 320
North Eastern: members appointed, 69
North Western: chairman appointed, 116
Operating costs 1976-77, (PQ) 493
South Wales: chairman appointed, 116
Southern: members appointed, 69
Consumers' Council: chairman appointed, 116
Electricity Boards
Interim price increases allowed by Price Commission, 3
North Western: chairman appointed, 168
Research on harmonic levels in electricity supply systems, 549
Electricity Boards
see Electricity
Electricity Consumers' Council
see Electricity
Electronic Design Fire Safety and Security Ltd
Develop fire alarm control panels, 74
Electronics industry
(*see also* Power plant industry)
Dumping of electronic components from Japan, (PQ) 631
Exhibitions and fairs: Munich, 229, 506; San Francisco, 90; Vienna, 451; Wiesbaden, 192
System to handle 1200 hybrid circuits an hour developed, 323
Employment
(*see also* Manpower Services Commission)
The economy – selected indicators: wholly unemployed and unfilled vacancies (*Published in all numbers*)
Job creation expenditure 1971-77, (PQ) 392
Unemployment, (ST): 1977, Nov, 473; Dec, 619
Working Abroad: the Daily Telegraph guide to working and living overseas, (BN) 322
Energy
(*see also* Atomic energy; Coal; Department of Energy; Electricity; Fuels; Gas; Offshore oil and gas industry; Petroleum)
Cutting Energy Costs, (BN) 547
EEC: adopts certain measures, 285; invites application for geothermal R&D programme, 77
Energy conservation: domestic insulation can produce vast energy savings, 75; government programme announced, 539
Energy Trends, summary of contents: 1977, Sept, 46; Oct, 374
Preliminary Analysis of the Potential for Energy Conservation in Industry, 539
Production of hydrogen by photobiological energy conversion, 435
Report of the Working Group on Energy Strategy: Energy Commission Paper no. 2, 260
Seminars: efficient use of energy in manufacturing industry, 65; industrial energy thrift scheme and energy audit scheme, 622
Solar energy research programme, 22
Energy Commission
Members announced, 166
Report of the Working Group on Energy Strategy (Energy Commission Paper no. 2), 260
Short Term Energy Forecasts 1977-78 (Energy Commission Paper no. 3), 259
Working Document on Energy Policy for the Energy Commission (Energy Commission Paper no. 1), 166
Engineering
(*see also* Civil engineering; Engineers; National Engineering Laboratory)
Bulletin of Statistics on World Trade in Engineering Products 1975, (BN) 172
Conference of Engineering Trade Associations established, 383
Exhibitions and fairs: Brno, 91; Singapore, 183, 401, 507; Stockholm, 191; Zurich, 506
Indices of production for engineering industries, (ST): 1977, May-July, 200; June-Aug, 410
Sales and orders in the engineering industries, (ST): 1977, July, 152; Aug, 474; Sept, 656
Seminar on sampling systems for on-line process analysers, 630
Engineering Industries Association
Export missions: China, Hong Kong and Singapore, Middle East, N America and South Africa, 182, 640
Engineers
Changes in the Population of persons with Qualifications in Engineering, Technology and Science 1959 to 1976: report, 161
Committee of inquiry into the engineering profession: members appointed, 619, 625
Fees and practices of consulting engineers, (PQ) 430
English Industrial Estates Corporation
Advance factory design award, 116
English Tourist Board
see Tourist trade
Ennals, David, Secretary of State for Social Services, Department of Health and Social Security
Visits Nigeria, 161
ERA Ltd
Research on harmonic levels in electricity supply systems, 549
Eurocom Export Services
To organise British small firms trade fair in Utrecht, 337
Eurocontrol
see Air traffic control
European Coal and Steel Community
Ministers' meetings *see* European Communities – Council of Ministers
Steel market decisions, (PQ) 390
European Communities
(*see also* European Coal and Steel Community; European Economic Community; Jenkins, Roy)
BBC programmes in French and German start, 500
Business Co-operation Centre: Annual report 1975-76, 332; choosing a business partner elsewhere in the Community, 78, 501
Commission
Applications for geothermal R&D programme invited, 77
Commissioner for Social Affairs: part-time adviser appointed, 332
Institutes legal proceedings against UK over tachograph, 176
Methodology of Concentration Analysis Applied to the Study of Industries and Markets, (BN) 386
Opens discussions on nuclear energy, 395
Proposals: on beef support system, 77, 126; on food additives, 500
Regional policy survey, (PQ) 493
A Study of the Evolution of Concentration in the Electrical Appliances industry: a report, (BN) 386
Council of Ministers
Adopt 'Cost project 30': electronic traffic aid study, 285
Adopt measures to end steel market disruption, 618
Ministers' meetings: Agriculture, 36, 77, 126, 257, 331, 334, 652; Development, 499; Energy, 285, 652; Environment, 652; Finance, 113, 176, 436, 499; Foreign, 113, 436, (PQ) 393, (PQ) 493; Posts and Telecommunications, 653; Research, 161; Social affairs, 285; Textiles, 618; Transport, 225, 285, 437
European Court of Auditors: members appointed, 225
European Development Fund: procurement procedures, (LA) 39
European Parliament *see* European Parliament
Loans to UK for industrial projects, (PQ) 633
Monetary union debate relaunched, (LA) 286
New EEC documents, 78, 127, 177, 226, 287, 395, 443
Official publications on community matters, 127, 179
Policy-Making in the European Communities, (BN) 428
Special development areas grants, (PQ) 495
European Court of Auditors
see European Communities
European Development Fund
see European Communities
European Economic Community
(*see also* Import duties. EEC; Import regulations, EEC)
Agricultural Guidance and Guarantee Fund (Feoga) *see* Agriculture – EEC Agricultural Guidance and Guarantee Fund
Agriculture *see* Agriculture
Anti-dumping *see* Anti-dumping
Association agreements: details, (LA) 288
BBC programmes in French and German start, 500
Business Co-operation Centre *see* European Communities
Commodity prices Feb 74-Oct 77, (PQ) 493
Common Agricultural Policy *see* Agriculture
Common Customs Tariff *see* Import duties, EEC
Common Fisheries Policy *see* Fishing industry
Cost of official visits to EEC, (PQ) 635, (PQ) 636
Customs duties *see* Import duties, EEC
Customs regulations *see* Import regulations, EEC
Draft directives: harmonisation of hot-water meters, (PQ) 495
Directives: heat generators, 652; insurance companies and their margins of solvency, 36; precious metals, (PQ) 430; rear view mirrors, 37; shipbuilding aids, (PQ) 492, (PQ) 634; titanium dioxide waste, 652
Economic indicators of the industrial countries, (ST): 41, 244, 461
EEC's progress rooted in concensus on major issues, (Sp) 394
Eliminating technical barriers to trade within the EEC: checklist of draft and adopted directives in the industrial sector, (LA) 80
European Investment Bank *see* European Investment Bank
European Parliament *see* European Parliament
European public holiday guide, (LA) (*insert*, 25 November)

continued

European Economic Community—*continued*
External relations: policies discussed, (Sp) 37
Harmonisation of legislation: classification, packaging and labelling of dangerous substances, 654; customs regulations, 178; EEC/Argentina agreement, 654; export credits, (PQ) 634; food-law directives, 83; motor vehicles, 226; postal services and telecommunications, 653; public supply contracts, 654
Heads of government agree 1978-79 budget contributions and regional fund, 482
Joint European Torus *see* Atomic energy
Ministers' meetings *see* European Communities – Council of Ministers
New EEC documents, 78, 127, 177, 226, 287, 395, 443
Official publications on community matters, 127, 179
Regional Development Fund *see* Regional development
Rules of competition, 38, 177, 226, 569; effect on Price Commission investigations, (PQ) 635
Standards: *Household Electrical Appliances — an EEC Survey*, 126
Steel companies allowed to reduce coking coal and coke quotas, 126
Steel products prices, (PQ) 493
Trade agreements: Algeria, 334; details, (LA) 288; Morocco, 334; Tunisia, 334; Turkey, 334
UK schemes to assist Industry submitted to EEC, (PQ) 552
UK support for enlarged EEC, 332
UK transitional period: effect of end on prices, (PQ) 555
European Investment Bank
EIB government scheme for development area loans, 568
Investment in the Community in 1976 and its Financing, 395
Loans: British Steel Corporation, 332; Lothian Council for water supply and sewerage schemes, 443; National Water Council, 443; South of Scotland Electricity Board, 443
European Parliament
European Assembly Direct Elections Bill: Commons' vote on electoral system, 538; second reading, 436
1978 session dates, 126
UK assurances on direct elections, 395
European Patent Organisation
see Patents
European Regional Development Fund
see Regional development
European Space Agency
Awards: space science experiment contract to BAC, 125; spacelab telescope contract to BAC, 22; two NASA space telescope contracts to BAC, 64, 325
Spacelab candidates undergo tests, 549
European Study Conferences Ltd
Organises conference on applying for a European patent, 37
European Trade Committee
see British Overseas Trade Board
Ever Ready Co (GB) Ltd
Price Commission investigation, 423, (PQ) 496
Excise duties
see Customs and Excise, HM
Exhibitions and fairs, Home
Design Centre: 'You'd be surprised by Dunlop's innovations in industry' exhibition, 116
Earls Court: Royal Smithfield Show, 483
Exhibition industry plans future organisation, 622
Export services, 646
London: Export 77, 504; National Aids for the Disabled Exhibition (Naidex 77), 398
National Exhibition Centre: Export Year Conference, 504; International Business Show, 116; International Mining Exhibition, (LA) 10, 65; International Sports and Leisure Exhibition (Isle 1977), 182
Southampton Boat Show, 27
Trade Promotions Guide, (*insert* 14 October)
Exhibitions and fairs, Overseas
Abidjan: British Trade Fair, 572
Algiers: International Trade Fair, 238
Amsterdam: International Congress of Encephalography and Clinical Neuro-Physiology, 28; Laboratory, Medical and Scientific Instruments Exhibition (Het Instrument), 236; World Congress of Neurology, 28
Annapolis: United States Sailboat Show, 273
Atlanta: International Telecommunications Exposition (Intelcom 77), 235
Atlantic City: Footwear Manufacturing Conference, 401
Baghdad: Capital Goods Exhibition, 93; Fair for Chemical Fertilisers, 639; International Fair, 235; International Fair for Hand Tools and Implements, 639; International Fair for Ready-Made Clothes and Accessories, 638
Basle: International Hotel and Catering Exhibition, 507
Brno: International Engineering Fair, 91
Brussels: British Food and Beverages Sample Show, 190
Bucharest: International Technical Exhibition and Chemistry Show (Technoexpo), 277
Chicago: Automotive Parts and Accessories Association (APAA) Show, 452; 'British Showcase' at Marshall Field, 28; Graph Expo 77, 192; Marine Trades Exhibition and Conference, 91, 132
Cologne: International Exhibition of Sports Facilities and Swimming Pools, 276; International Fair for the Child, 93, 192; International Garden Trade Fair, 29; International Trade Fair of Sports Goods, Camping Equipment and Garden Furniture (SPOGA), 90

Exhibitions and fairs, Overseas—*continued*
Damascus: International Trade Fair, 277
Denver: International Association of Fire Chiefs Annual Conference, 133
Dortmund: Remploy Exhibition, 191
Dubai: Middle East Health Exhibition, 397
Düsseldorf: European Footwear Samples Display (GDS), 93; Industrial Safety and Factory Hygiene Exhibition and Congress, 229, 645; International Congress and Exhibition for Instrumentation and Automation (Interkama), 189
Essen: Welding and Cutting Exhibition, 29, 133
Export services, 508, 646
France: Mobilier de France store promotion, 584
Frankfurt: International Book Fair, 276; International Motor Show, 28; International Textiles for Clothing Exhibition (Interstoff), 229, 506
Genoa: International Boat Show, 274
Hamburg: EMTEC and International Boat Show, 274
Hanover: International Machine Tool Exhibition (ZEMO), 23, 89
Helsinki: International Technical Fair, 90
Hong Kong: British Industrial Exhibition, 505
Johannesburg: International South African Packaging and Food Processing Exhibition, 133
Lagos: International Trade Fair, 348
Lille: Indigo Fair, 93
Lyons: International Furniture Exhibition (Meuropam), 189
Madrid: El Corte Inglés and Galerias Preciados store promotions, 346; Medical, Instrumentation and Technical Exhibition (Expomedica-Instrumentalia), 85, 270, 346
Malmö: International Hotel Catering and Restaurant Fair (Resta VIII), 191
Milan: International Cycle and Motor-Cycle Exhibition, 644
Munich: Exhibition and Congress for Electronics Production (Productronica), 229, 506; International Exhibitions Congress for Computer Systems and their Applications, 273; International Fashion Week, 238
Nairobi: International Show, 277
New Orleans: International Association of Amusement Parks and Attractions Exhibition, 584
New York: European Fashion Fair, 235
Osaka: Japan Audio Fair, 132
Paris: Au Printemps store promotion, 238; Children's Fashionwear Exhibition, 133; European Menswear Exhibition, 133; Exposition Grande-Bretagne at Au Printemps, 28; International Leather Week, 92; International Photographic, Cinema and Optical Exhibition, 277, 584; Jewellery, Silverware, Clocks, Watches and Gifts Exhibition (Bijorhca), 92; Salon du Pret-à-Porter Feminin, 347; Salon International des Industries d'Equipement et d'Entretien de l'Automobile (Equip'auto), 348; World Congress on Intensive Care, 236
San Francisco: Western Electronic Show and Convention (Wescon), 90
Seattle: Commercial Fishing Exhibition, 236
Seoul: British Industrial and Scientific Technology Exhibition, 93
Singapore: Asian International Chemical and Process Engineering and Contracting Show (Chemasia), 183; International Materials Handling and Construction Machinery Exhibition (IMAC 77), 2, 276; Machine Asia, 401, 507; Toycraft 78, 444
Stockholm: 'British Accent' promotion, 28; International Technical Fair, 191
Tehran: International Educational and Training Equipment Exhibition, 86; International Trade Fair, 92
Tokyo: Building Materials Exhibition, 644; International Anti-pollution Exhibition (Apex 78), 24; International Toy Fair, 190; Laboratory Ware and Scientific Equipment Exhibition, 347; Materials Testing Equipment Exhibition, 86; Motor Show, 85, 136, 452; Tokyo Pack 78, 337
Toronto: National Interior Design Show, 451
Trade Promotions Guide, (*insert* 14 October)
Utrecht: International Security Exhibition (Security 77), 346; Netherlands Spring Fair, 337
Vienna: Internepcon-Vienna 77, 451
Wiesbaden: Military Electronics (Defence Equipment) Exhibition, 192
Zurich: International Trade Fair for High Precision Techniques, Dimensional Measurement and Control (Microtechnic), 506
Expenditure
(*see also* Capital expenditure)
Consumers' expenditure, (ST): 1977, 3rd qtr, 203
The economy – selected indicators: capital, consumers' and personal (*Published in all numbers*)
Export Competitiveness Index
see Foreign trade, UK
Export credit
Withheld export credits, (PQ) 631
Export Credits Guarantee Department
Arrangements for sterling finance for exports with credit terms of two years or more, 638
Bank guarantees help exports on short-term credit, (Sp) 229
Bond support scheme: minimum limit for export contracts reduced, 572
Continuing rise in demand for ECGD facilities, (Sp) 180
Contracting in foreign currency: leaflet, 131
Cover to Chile, (PQ) 390
Expenditure on export business, (PQ) 635
Guarantees for Bonds: leaflet, 130

Export Credits Guarantee Department—*continued*
Insurance scheme for very large overseas projects, 638
Level of contracts qualifying for cover, (PQ) 498
Lines of credit: general purpose, (LA) 25; Irish Republic, 337; Poland, 229, 444
Loan guarantees: for cargo vessel for Liberia, 24; for chemical plant equipment in Czechoslovakia, 444; for completion of 'Skikda 5 and 6' projects in Algeria, 618; for copra plant in the Philippines, 65; for motel in Sharjah, 113; for natural gas liquefaction project in Algeria, 618; for oil refinery in Portugal, 572; for paper board mill equipment in Poland, 502; for rubber-processing plants in USSR, 502; for shipbuilding plant in S Korea, 638
London office: director appointed, 161
Minimum access figure for buyer credit facilities, (PQ) 498
Number of staff employed 1972-77, (PQ) 223
Pay policy compliance and credit support applications, (PQ) 327, (PQ) 329
Rules of access in foreign currency financing, 180
Statutory return 1977, 3rd qtr, 444
Trading results for year ending 31 March 1977 published, 257, 335
Wall chart for 1978 published, 314
Export documents
see Export trade procedure
Export Intelligence Service
see Department of Trade
Export licensing, EEC
Copper, lead and aluminium scrap to third countries, 396
Iron and steel, (PQ) 390
Non-alloy ferrous scrap to non-EEC countries, 26, 653
Export price index
see Foreign trade, UK – Export competitiveness index
Export services
see under individual subject
Export trade procedure
Certificates of origin: issuing bodies, (*correction*) 85
Customs additional code to be inserted, 85
Customs Co-operation Council Nomenclature: changes from Jan 1978, (LA) 446
Form C105 revised, 183
Simplification of International Trade Procedures Board: member appointed, 335; seminar on systematic export documentation, 183
UK Tariff and Overseas Trade Classification: country code changes 1978, 448
Export trade promotion
(*see also* British Overseas Trade Board; Exhibitions and fairs; Export Credits Guarantee Department; Hints to Businessmen; Ministry of Overseas Development; Visits overseas by businessmen)
Conference: Exporting to Western Europe 1977, 2, (*insert*, 25 November), (Sp) 419, (*correction*) 437
Export intelligence – 25 million cards on, (LA) 184
Export services, 647
Export 77: exhibition, advisory centre and seminars, 504
Export Year
Announced by Hevac, 640
Awards: Federation of Sussex Industries, 183
Competitions: for slogans, displays and publications, 268; to find Export Year expert, 268
Conference to plan Export Year follow-up, 504
Van Heusen improves quality of finished product 335
Export Year News, No 8, (*insert*, 2 December)
Exports matter more than oil, (Sp) 229
Government services, (PQ) 433; increased charges, (PQ) 636
Importance of quality of Britains's exporting, (Sp) 335
Operating a Trade Information Service: a handbook for developing countries, (BN) 120
Seminars: doing business in Argentina, 131; Export finance, 24; export planning and research in Birmingham, 23; Exporting for the small business, 23; Exporting to Japan, 129; Mexico, 86, 228; new business opportunities in China, 131; to attract Scandinavian investment to UK, 263, 380; trading with the USSR, 448
Trade promotions guide, 1977-79, (*insert* 14 October)
Export Year
see Export trade promotion
Export Year News
No 8, (*insert*, 2 December)
Exports
see Foreign trade; Invisible exports

F

Fairclough Construction Group
Newcastle metro stations near completion, 320
Fairey Company Ltd
Receiver appointed, 65
Subsidiaries acquired by NEB, 544
Fancy goods
see Giftware
Farm machinery
see Agricultural machinery
Fasteners
Fastener for GRP panel developed, 173
Import duties *see* Import duties
Fay Committee
see Crown Agents

Federation of Merchant Tailors
Seminar on Exporting for the small business, 23
Federation of Sussex Industries
Export Year awards announced, 183
Fellowship of Engineering
Soirée and exhibition at the National Maritime Institute, 175
Feoga
see Agriculture – EEC Agricultural Guidance and Guarantee Fund
Ferrous Foundries Economic Development Committee
see National Economic Development Office
Ferrous foundry scheme
see Foundry industry
Fertilisers
see Agriculture
Field, John
Appointed BOTB special adviser on Japan, 397
Fiji
Hints to Businessmen, revised edition, 23
Import licensing: cooking pots, blending compounds, foam or sponge shapes, 97; wood and wood products, 97
Film industry
British Film Fund Agency returns, (ST): 1977, Aug, 57; Sept, 297
Cinema admissions and takings, (ST): 1977, July, 58; Aug, 365; Sept, 671
Export services, 403
Fees for registrations of films, exhibitors' and renters' licences increased, 212
National Film Development Fund: Advisory Committee members appointed, 69; financial situation, (PQ) 555
National Film Finance Corporation: *Annual Report and Statement of Accounts*, 622; assistance, (PQ) 494; composition, (PQ) 498
Registrations of British and foreign films (*Lists published in all numbers*)
Finance
(*see also* Banking; Credit; Expenditure; Investment; Taxation)
Committee to Review the Functioning of Financial Institutions: progress report, (LA) 620
Financial Times
Conference on European business in world development, 208 (LA) 270
Finland
(*see also* Scandinavia)
Cosmetic regulations, 136
Duty free area facilities, 588
Excise taxes on foodstuffs: changes, 589
Import regulations: certain pesticides, 456; dogs and cats, 648
Minimum import price: shirts, 97
Tax valuation of motor cars, 456
Fire precautions
see Safety
Fireworks
see Safety
Firth Vickers Foundry Ltd
Develop computerised die store, 52
Fishing industry
EEC Common Fisheries Policy: ban on fishing for Norway pout, 126; herring fishing ban extended, 36; derogation request granted, 331; statements on proposals discussed, 225, 499, 568; USSR fishing rights lapse, 77
Exhibitions and fairs: Seattle, 236
Fishing Industry Safety Group: interim report, (LA) 426, (PQ) 497
Fishing vessel survey fees reduced, 257, (PQ) 432
UK/Denmark talks, 37
Fisons Ltd
Price Commission: allows interim price increase, 64; investigation, 6
Floorcoverings
Carpet sales, (ST): 1977, May-July, 154; Aug, 477; Sept, 668
Exhibitions and fairs: Toronto, 451
Flour
see Food
Fluidics
Fluid Flow Measurement in the Mid-1970's, 549
Focus Contact Lens Laboratory
Develop soft contact lens, 73
Food
(*see also* Catering trades; Dairy products)
Additives: Commission proposals on food additives, 500
Apples: EC Commission agrees tariff reduction, 257, 334; EC Commission proposal to suspend customs duties, 126
Bananas: UK imports 1972-77, (PQ) 553
The Biscuit Market in the UK, (BN) 18
Bread: effect of EEC wheat levy on bread prices, (PQ) 495; ending of bread subsidy scheme, (PQ) 224; monopoly conditions, (PQ) 636; Price Commission not to investigate proposed price increases, 383: statutory maximum prices amended, 425
EEC food – law harmonisation directives, 83
Exhibitions and fairs: Basle, 507; Brussels, 190; Johannesburg, 133
Flour: bread flour prices, (PQ) 493; monopoly conditions, (PQ) 636; Price Commission not to investigate proposed price increases, 383
Food supplies moving into consumption in UK, (ST): 1976, (revised) 366
Fruit: EEC ministers propose tariff changes, 36
Import licensing see Import licensing

Food—*continued*
Manufactured food: price increases June 1975 – Oct 1977, (PQ) 493
Meat
Bacon: imports 1976 and 1977, (PQ) 429; Price Commission examination, 117
Beef: EC Commission proposals on beef support system, 77, 126; imports 1976 and 1977, (PQ) 429
Unit pricing, (PQ) 633
National food survey, (ST): 1977, 2nd qtr, 54; 3rd qtr, 669
Pineapples: imports 1972-76, (PQ) 553
Potatoes: EC Commission proposals on a potato market regime, 126; frozen chips prices, (PQ) 555; potato product prices, (PQ) 393, (PQ) 550; supplies back to normal, 112; wholesale prices, (PQ) 498
Prices: effect of EEC membership, (PQ) 492; increases Oct 1976-77, (PQ) 550; increases since Feb 1974, (PQ) 550
SRC grant awarded to study effects of processing operations on proteins, 76
Strong growth in UK food exports, (Sp) 638
Sugar: EEC Ministers agree mandate for international sugar negotiations, 36; Hong Kong Commodity Exchange to trade in sugar futures, 230
Vegetables: prices during 1977, 544, (PQ) 550; supplies back to normal, 112
Footwear
Exhibitions and fairs: Atlantic City, 401; Dusseldorf, 93
Footwear Industry Scheme: government grants, (PQ) 330
Imports from E Europe, (PQ) 392
Planning agreements with footwear companies, (PQ) 330
Price Commission examination, 117
Orders, deliveries and stocks, (ST): 1977, July, 107; Aug, 414; Sept, 593
Ford Motor Co Ltd
IDC application, (PQ) 432
Motor Distributors: Ford, (BN) 120
New jobs created, (PQ) 223
Foreign exchange
(*see also* Balance of payments)
Autumn Budget 1977 measures, 218
ECGD introduces new rules of access in foreign currency financing, 180
Effect of sterling appreciation on: exports, (PQ) 328, (PQ) 391, (Sp) 502; industry, (PQ) 492
Official reserves, (ST): 1977, Sept, 57; Oct, 297; Nov, 534
Pound allowed to float, 208
Foreign trade
European business in world development, (Sp) 208, (LA) 270
Foreign trade, UK
(*see also* Balance of payments; British Overseas Trade Board; Invisible exports *and headings beginning with the words Export, Import*)
The economy – selected indicators: visible trade on a balance of trade basis (*Published in all numbers*)
Effect of Arab boycott, (PQ) 328
Effect of sterling appreciation on exports, (PQ) 328, (PQ) 391, (Sp) 502
Export competitiveness index, (PQ) 492, (PQ) 631
Export successes, 100, 193, 278, 349, 453, 585
Exports of *individual products see under subject*
Exports pulling Britain out of the doldrums, (Sp) 181
Imports of *individual products see under subject*
Increase of UK export prices Oct 1976-77, (PQ) 497
Market reports: France (Brittany and Loire Valley), (LA) 642; France (South-East France), (LA) 186; France (South of France), (LA) 449; Ivory Coast, (LA) 579; (*correction*) 639; Nigeria, (LA) 338; Tanzania, (LA) 87
1977, 3rd qtr, (ST) 522
Profitability of home and export markets, (PQ) 492
Survey of short-term export prospects, (ST): 1977 3rd qtr – 1978 2nd qtr, 531
Trade with: Abu Dhabi, (PQ) 429; China, (PQ) 631; Comecon countries, (PQ) 392; Dubai, (PQ) 429; Germany, (PQ) 328; Greece, (PQ) 631; Japan, (PQ) 328, 397, (PQ) 554, (PQ) 631; Middle East, (Sp) 502; Netherlands, (PQ) 328; Nigeria, (PQ) 631; Oman, (PQ) 429; Portugal, (PQ) 631; South Africa, (PQ) 328, (PQ) 553, (PQ) 631; Spain, (PQ) 631; Uganda, (PQ) 631
UK exports of manufactured goods as proportion of total UK exports, (PQ) 433
UK re-exports, (PQ) 391
UK/German Democratic Republic joint commission, fourth meeting, 448
UK/Israel joint committee: second meeting, 65, (LA) 129
UK/Poland joint commission: sixth meeting, 161; sixth meeting, statement issued, (LA) 228, (*correction*) 270
Volume of exports 1977, (PQ) 632
Forklifts
see Contractors plant; Materials handling
Foster Cambridge
Develop temperature controller for historic textile restoration, 74
Foundry industry
Ferrous Foundry Scheme: applications received and assistance paid, (PQ) 492, (PQ) 497
Foundrymen's Views: an attitude study in the ferrous foundries industry, (BN) 264
France
Agriculture order: trichlorophenoxyacetic acid, 239
Certificates of origin: (*correction*) 33, 195

France—*continued*
Confectionery in France, (BN) 18
Contrats de croissance, (PQ) 636
Economic indicators of the industrial countries, (ST): 41, 244, 461
Food and drug regulations: health and dietetic foods, 136, (*correction*) 239
Import regulations: electronic television games, 136
Market reports: Brittany and Loire Valley, (LA) 642; South-East France, (LA) 186; South of France, (LA) 449
Safety regulations: seatbelts, 239
UK/France talks at Chequers: statement, 538
Fraser, John, Minister of State, Department of Prices and Consumer Protection
Addresses: European Study Conference on the financial motivation of managers, (Sp) 163; European Study Conference on the Unfair Contract Terms Act, (Sp) 421; London Chamber of Commerce seminar on product liability insurance, (Sp) 210; Royal Society for the Prevention of Accidents, 6
Statement welcoming Unfair Contract Terms Act, 210
Freeson, Reginald, Minister for Housing and Construction
Addresses International Congress on Arbitration in Construction and Civil Engineering Contracts, (Sp) 397
Freighting
see Transport
French Chamber of Commerce of Great Britain
Conference: The Channel: trade barrier or bridge?, 24
Fruit
see Food
Fuels
Degree day figures, (SY): 1977, Sept, 118; Oct, 262; Nov, 545
Fulop, Christina
The Consumer Movement and the Consumer, (BN) 628, (*correction* 13 January 1978, page 52)
Furnishings
Exhibitions and fairs: Toronto, 451
Furniture
Exhibitions and fairs: France, 584; Lyons, 189
Fuses
see Electrical equipment

G

Galebourne Ltd
Occupy advance factory at Gwaun-cae-Gurwen, 70
The Gambia
Import duties: tariff changes, 352
Gaming machines
see Amusement machines
Garage Equipment Association
Recommends that air-pressure gauges go metric, 624
Garden equipment
Exhibitions and fairs: Cologne, 29, 90
Wheeled rake developed, 124
Gas
(*see also* Offshore oil and gas industry)
Consumers' Councils
North Eastern: members appointed, 214
North Western: members appointed, 69, 214
South Eastern: members appointed, 69, 214
South Western: members appointed, 384
Gas appliances: MMC reference, 486
Gattorna, John
Distribution Planning and Control: a corporate approach, (BN) 120
Gaworska, Jane
Health and Safety Literature: a selective list of materials held by the SRL, (BN) 386
GD (Cumbria) Ltd
Occupy advance factory at Cleator Moor, 485
GEC Machines Ltd
New coil factory at Rugby, 624
General Agreement on Tariffs and Trade
Multi-fibre arrangement: EEC discussions, (PQ) 635; EEC negotiations with India, S Korea, Brazil and Taiwan, (PQ) 555; EEC renews MFA and terms of bilateral agreements, 618; renegotiation, the background, (LA) 227; UK starts negotiations, 113; states position, 331
German Chamber of Industry and Commerce in London
Exporting to the Federal Republic of Germany, (BN) 488
Survey of investment intentions of German companies in UK, 422
German Democratic Republic
UK/GDR joint commission: fourth meeting, 448
Germany (Federal Republic)
Confectionery in the Federal Republic of Germany, (BN) 18
Economic indicators of the industrial countries, (ST): 41, 244, 461
Exporting to the Federal Republic of Germany, (BN) 488
Hints to Businessmen, revised edition, 448
Mission of senior industrialists and bankers: visit UK, 64; recommend more investment, 114
Order on the Treatment of Animal Feedstuffs of Animal Origin during Production, 33
Production of foodstuffs, (*correction*) 33

continued

Germany (Federal Republic)—*continued*
Survey of investment intentions of German companies in UK, 422
Turnover tax: increases, 33
UK/Germany agreement on ships' safety equipment inspection, 397
Visit by: Denis Healey, 332; James Callaghan and David Owen, 77
Ghana
Double taxation convention signed, 640
Exchange Control: blocked remittances, 97
Import duties: changes, 136
Giftware
Exhibitions and fairs: Paris, 92
GIRO
see Post Office
Giscard D'Estaing, Valery
Visits UK for talks at Chequers, 538
GKN Mills Building Services Ltd
Suggestions from employees increase exports, 504
GKN Sankey
Takes part in Tokyo Motor Show, 136
Glass industry
Strain viewing instrument developed, 73
Glenfield and Kennedy Ltd
Acquired by Neptune International Corporation, 422
Department of Industry investigation, (PQ) 328
Golzen, Godfrey
Working Abroad: the Daily Telegraph guide to working and living overseas, (BN) 322
Gordon Inflatable Boats Ltd
Occupy advance factory at Knowsley, 485
Grant, John, Parliamentary Under-Secretary of State, Department of Employment
Addresses Bland Payne safety award presentation, (Sp) 118
Grant, Wyn
The Confederation of British Industry, (BN) 264
Gray, Ian, Managing Director Welsh Development Agency
Visits US on investment mission, 623
Gray Tool Co (Europe) Ltd
Obtains oil well-head equipment orders, 384
Greece
Import duties: animal feedstuffs, 240
Import licensing: swine, 512
Import regulations: motor vehicle parts, 512
Green, A. H.
Computerguide 13: production control implementation, (BN) 488
Grenada
Import licensing: changes, 352
Gross Domestic Product
The economy-selected indicators (*Published in all numbers*)
Grosvenor Hypower Ltd
Develop turning tool for hydraulic rams, 630
Grundy and Partners Ltd
Develop easy-to-use computer display terminal, 629
Guardian and Manchester Evening News Ltd
Consent given to takeover of Swain and Co Ltd, 384
Guatemala
Import duties: passenger vehicles, 240
Guy-Raymond Engineering Co Ltd
Develop nylon hub for small pneumatic tyres, 20
Gyllenhammar, Pehr G.
People at Work, (BN) 72
Gyro Mining Transport Ltd
Develop mining train driven by linear motors, 388

H

Hadida, E. A.
Credit control for a small manufacturer, 259
Hall, Prof David
Develops production of hydrogen by photobiological energy conversion, 435
Hall, P. E.
Comouterguide 13: production control implementation, (BN) 488
Hand tools
Exhibitions and fairs: Baghdad, 639
Hart, Judith, Minister of State, Ministry of Overseas Development
Statement on Community aid to non-associates, 499
Harwell
see United Kingdom Atomic Energy Authority
Hattersley, Roy, Secretary of State, Department of Prices and Consumer Protection
Addresses: Audit Bureau of Circulations, (Sp) 317; European League for Economic Co-operation, (Sp) 543; London Association of Agricultural Representatives, (Sp) 419
Statement on retail price index for September, 153
Havant Instruments Ltd
Develop low-cost digital thermometer, 323
Healey, Denis, Chancellor of the Exchequer
Autumn budget 1977, 210, (LA) 216
Decisive turn in pace of inflation: letter to IMF, (LA) 621
To visit Germany, 332
Health
(*see also* Department of Health and Social Security)
Health and Safety Literature: a selective list of materials held by the SRL, (BN) 386
Protection of Workers Against Noise and Vibration in the Working Environment, (BN) 72

Trade and Industry Index

Volume 29 October to December 1977

Issue paging and dates

1— 60	7 October 1977
61—110	14 October 1977
111—158	21 October 1977
159—206	28 October 1977
207—254	4 November 1977
255—310	11 November 1977
311—376	18 November 1977
377—416	25 November 1977
417—480	2 December 1977
481—536	9 December 1977
537—616	16 December 1977
617—672	23-30 December 1977

Health and Safety Commission
Ceramics industry advisory committee established, 627
Health and Safety Commission Report, 1974-76, (LA) 66
Proposals for New Legislation for Pressurised Systems: consultative document, 491
Health and Safety Executive
Health and Safety Research 1976, 490
Health and Safety Statistics 1975, 68
Safety in the Operation of Ceramic Kilns, 549
Time Off for Training of Safety Representatives: proposal to approve a code of practice, 543
Welding and Flame Cutting Using Compressed Gases, 326
Health and Safety Laboratories
Survey of services provided, 15
Heat transfer and fluid flow service
Range of services provided, 175
Heating and ventilation
(*see also* Fuels)
Air conditioning unit for computer rooms developed, 173
Heat Transfer and Fluid Flow Service: range of services provided, 175
Industrial space heater burning waste engine oil developed, 629
The Japanese Market for Combustion and Heat Treatment Equipment: report, 269
Mobile refrigeration system developed, 490
Non-wetting humidifier developed, 489
Sub-zero transport refrigeration units developed, 548
Ventilation Requirements (BRE Digest 206), 75
Heating Ventilation and Air Conditioning Manufacturers Association
Make 1978 Export Year, 640
Helicopters
Numbers and types used in offshore oil and gas installations, (PQ) 553
Heron Corporation Ltd
Merger not referred to MMC, 544
Hevac
see Heating, Ventilating and Air conditioning Manufacturers Association
Highlands and Islands Development Board
Export missions: United States and Canada, 348
Hints to businessmen
Revised editions: Australia, 23; Bahrain and Qatar, 268; Costa Rica, 23; Dominican Republic, 640; Fiji, 23; Germany and W Berlin, 448; Hungary, 335; Iran, 640; Iraq, 640; Ivory Coast, Niger and Upper Volta, 335; Jordan, 23; Malaysia and Brunei, 640; New Zealand, 448; Spain, 640; Sri Lanka, 448
Hire purchase
see Credit
Hirst, L. R. C.
The Consumer Society, (BN) 18
Hitachi
Proposed colour television factory, (PQ) 434, (PQ) 496, (PQ) 497, (PQ) 634; government statement, (PQ) 554
Hivent Ltd
Shares acquired by NEB, 4
HM Customs and Excise
see Customs and Excise, HM
HM Treasury
see Treasury, HM
Holland
see Netherlands
Holt (John) and Co (Liverpool) Ltd
Merger not referred to MMC, 544
Home safety
see Safety
Hong Kong
Commodity Exchange to trade in sugar futures, 230
Increase in international trade during 1977, 348
Industrial property convention, 240
Horam, John, Parliamentary Under-Secretary of State, Department of Transport
Visits Baghdad to discuss possible road haulage agreement, 573
Horses
see Livestock
Horsman Brothers
Develop automatic capstan lathe, 19
Hortex Chemical Products Ltd
Occupy advance factory at Ynyscedwyn, 70
Horticulture
End of EEC transition tariffs on horticultural products, 569
Exhibitions and fairs overseas: government assistance, (PQ) 392
Hosiery
Government policy on hosiery imports, (PQ) 328
Index of production of hosiery and other knitted goods, (ST): 1977, Aug, 306; Sept, 668
Hospital equipment
see Medical equipment and supplies
Hotels
(*see also* Tourist trade)
Prices at a glance order published, 379
Service charges code, (PQ) 430
Sleeping Accommodation – Price Display: leaflet, 623
House of Fraser
Merger not referred to MMC, 260
Howe Systems Engineering
Occupy advance factory at Gateshead, 165
HS 146
see Aircraft
HS 748
see Aircraft
Huckfield, Leslie, Parliamentary Under-Secretary, Department of Industry
Addresses: Business Statistics Office, (Sp) 258; Civil Service College, (Sp) 114; Shaping Tomorrow conference in Birmingham, (Sp) 4
Announces: government assistance to support local school/industry links, 540; Shaping Tomorrow conference for North-East, 380
To open Dunlop exhibition at Design Centre, 116
Hulke, Malcolm
Bring Your Own Towel: a guide to residential conference centres, (BN) 172
Humberside
see Yorkshire and Humberside
Hunday Electronics Ltd
Develop electronic feed controller for cows, 267
Hungary
Hints to Businessmen, revised edition, 335
Hunslet Engine Co Ltd
Develop mine locomotive for steep gradients, 629
Hydraulics
Heavy-duty pneumatic cylinders developed, 387
Pumps: compressors with integral aftercooler developed, 548
Valves: valve reclamation technique developed, 76
Hymatic Engineering Co Ltd
Develop miniaturised cooling system, 74

I

IDC
see Industrial location – Industrial Development Certificates
IMCO
see Intergovernmental Maritime Consultative Organisation
Imperial Chemical Industries Ltd
Increase in fertiliser prices, (PQ) 636
Price Commission investigation, 626
Imperial Metal Industries Ltd
Export missions: Middle East, 182
Import duties, EEC
Anti-dumping duty *see* Anti-dumping
Civil aircraft, (PQ) 631
Common Customs Tariff
Conditions of entry of certain goods, 654
End of transition tariffs on horticultural products, 569
Suspensions, 570; agricultural and industrial sectors, review, (LA) 440, (LA) 571; aircraft components, 570; apples, 334; application for colour negative film and Butorphanol, 78; applications, 226; temporary suspensions, 127
End of transitional period between EEC and new member states, 500
Generalised System of Tariff Preferences (GSP): 1978 scheme agreed, 569; restoration of normal duties, 79, 226, 334, 570
Iron or steel units from Taiwan, 396, (*correction*) 437
Need for selective import safeguards, (Sp) 505
Tinned foods, (PQ) 635
Valuation of goods re-imported after outward processing or repair, 437
Import duties, UK
(*see also* Import duties, EEC)
Declarations of value for duty, 641
End-use relief: changes in procedure, 131
Tobacco products, 398
Import licensing, EEC
Belgian measures to protect textile and clothing industries, (PQ) 555
Certain knitted or crocheted outer garments from Singapore, 27

continued

Import licensing, EEC—*continued*
Certain knitted or crocheted undergarments from Brazil, 337
Import licensing, UK
Bananas from the dollar area, 131
Gold coins, gold medals, etc, 572
Imports from Romania, 398
Liberalisation of certain gloves, 641
Portable monochrome television sets from Taiwan, 641
Seed potatoes, 230, *(correction)* 337
Import regulations, EEC
Anti-dumping see Anti-dumping
Community surveillance over imports of slide fasteners, 654
Declaration of particulars relating to value of goods for customs purposes, 443
EEC preferences: new customs notices, 653
End of transitional period between EEC and new member states, 500
High carbon ferro-chrome quotas, 333
Imports from non-member states, 178, 226, 334, 396, 501, 654
Rules of origin: slide fasteners, 38
Tariff quotas 1977: exhaustions, 79, 333, 570; replenishments, 78, *(correction)* 177
Tariff quotas 1978, (LA) 439; newsprint, 653
Textiles, 38, (PQ) 223
Import regulations, UK
(see also Import regulations, EEC)
Barriers to trade in alcoholometers and hydrometers removed, 383
Changes in customs import entry and boarding procedures, 84
Disclosure of import information, 86
Preparation of import arrangements for restricted textiles in 1978, (LA) 398, *(correction)* 504
Reclassification of certain goods on 1 January 1978, 641
Tariff quotas 1977: exhaustions, 570
Tariff quotas 1978, (LA) 439; paper and board and certain printed products originating in EFTA countries (and Finland), (LA) 573, *(correction)* 639
Income
see Income and wealth; Pay
Income and wealth
(see also Pay)
Royal Commission on the Distribution of Income and Wealth
Background paper 3 – The Effects of Certain Social and Demographic Changes on Income Distribution, 543
Background paper 4 – The Distribution of Income in Eight Countries, 543
Report no. 5 – Third Report on the Standing Reference, 382
Indonesia
Import duties: baby food, 404; corrugated filter paper, 137; sanitary towels, 240; raw materials for textiles, 589
Import regulations: textiles, 137
Indonesia: business opportunities, (BN) 120
Sales tax: raw materials for textiles, 589
UK grant for marine navigation aids, 113
Indonesian Association
Second joint Seatag/Indonesian Association reception, 230
Industrial building
Advance factories: Bootle, 165; Bromborough, 623; Catterick, 383; Dearne Valley, (PQ) 492; Deeside, 383; Dundee, 542; Edinburgh, 542; Gainsborough, 7; Kirklees, (PQ) 330; Liverpool, 316, 623; Malton, 165; Netherton, 317; Newtown, 423; North Shields, 69; Oswestry, 211; Pocklington, 423; St. Helens, 116; South Shields, 543; Southampton, 165; Sunderland, 317; Thornaby, 165, 383; Wales, 69, 623; Walker, 69; Yorkshire and Humberside, (PQ) 328
Advance factory programme: completions 1974-77, (PQ) 222; costs, (PQ) 551, (PQ) 552; extended, (LA) 316; policy on leasehold sales, (PQ) 330; small-unit programme announced, (Sp) 163
Industrial estate proposed for Llantrisant, 165
Industrial democracy
Employee Participation: current practice and future intentions, (BN) 72
Work Revolution, (BN) 72
Industrial Development Advisory Boards
see Department of Industry
Industrial Development Certificates
see Industrial location
Industrial efficiency
see Industry
Industrial location
(see also Industrial building; Office location; Regional development)
Advance factories: Ammanford, 70; Barrow, 317; Birkenhead, 69, 211, 543; Blackpool, 211; Brighouse, 542; Cardiff, 165; Cumbria, 485; Doncaster, 542; Gateshead, 165; Knowsley, 423, 485, 623; Truro, 543; West Wales, 70
Industrial Development Certificates: issued in Wales 1967-77, (PQ) 634
Industrial production
(see also Manufactures)
The economy-selected indicators: index of industrial production (*Published in all numbers*)
Index nos, (ST): 1977, Aug, 154; Sept, 408; Oct, 664
Index nos for Scotland, (ST): 1977, 2nd qtr, 666
Index nos for Wales, (ST): 1977, 2nd qtr, 156
Industrial relations
Collective Bargaining and Inflation: new relations between government, labour and management: final report on an international management seminar, (BN) 72
Industrial relations—*continued*
Industrial safety
see Safety
Industry
Education's attitude to industry needs to change, (Sp) 380
Government assistance
Assistance under Industry Act 1972 section 7 to assisted areas see Regional development
Assistance under Industry Act 1972 section 8 to industries and individual companies see under Industry – Industry Act 1972 assistance
Contracts preference scheme, (PQ) 634
Criteria for regional aid, (PQ) 393
Expenditure, (PQ) 633, (PQ) 634, (PQ) 637
Industrial research and development, (PQ) 634
Schemes submitted to EEC, (PQ) 552
To support local school/industry links, 540
Importance of co-operation between industry and school, (Sp) 4
Improving understanding between industry and the civil service, (Sp) 114
Industrial capacity in the UK, (PQ) 552
Industrial efficiency and government policy, (LA) 121
Industrial Efficiency and the Role of Government, (BN) 120
Industry Act 1972 assistance
Accelerated Projects Scheme: distribution of offers and payments, (PQ)496
Disclosure of financial assistance, (PQ) 631
Drop Forging Industry Scheme established, 256
Guide to schemes of selective financial assistance, (*insert*, 7 October)
Industry schemes closing dates, (PQ) 552
Machine Tool Industry Scheme: assistance approved to date, (PQ) 223; to end 382
Paper Industry Scheme: grants approved, (PQ) 552
Printing Machinery Scheme: grants approved, (PQ) 552; to end, 317
Pulp, paper and converting industries: government aid, (PQ) 554
Sectoral industry schemes: list of companies receiving first payment, (ST): 1977, July-Sept, 412
Selective investment scheme, (PQ) 393
Textile Machinery Industry Scheme: end of scheme, 317; grants approved, (PQ) 553
Timber and furniture industries: government aid, (PQ) 554
Wool Textile Scheme: assistance available, (PQ) 223
Inner Urban Areas Bill published, 620
Investment intentions for 1977 and 1978, (ST) 47
Methodology of Concentration Analysis Applied to the Study of Industries and Markets, (BN) 386
Planning agreements: administrative procedures, (PQ) 632; number signed, (PQ) 389; rate of progress, (PQ) 430; under consideration, (PQ) 550
Ratio of net trading income to net trading assets, (PQ) 329
Shaping Tomorrow: conference for North-East, 380
Industry Act 1972
see Industry; Regional development
Industry, Department of
see Department of Industry
Inflation
see Economic conditions; Economic policy
Inland Revenue
Consultative paper on foreign earnings of self-employed issued, 319
Insac Data Systems Ltd
Systems Designers Ltd to join Insac, 164
Insight
New monthly bulletin on the Caribbean, 131
Insolvency
see Bankruptcy
Institute of Bankers
Banks and the British Exporter: based on the seminar held at Christ's College, Cambridge, 11-16 September 1977, (BN) 428
Institute of Export
Annual conference, 337
Institute of Purchasing and Supply
Conference: the buyer and the law, 627
Institution of Works Managers
Addressed by Eric Varley, (Sp) 380
Insulation
see Energy-Energy conservation
Insurance
(see also Export Credits Guarantee Department)
Arab Insurance Conference 77, 24
EEC directive on insurance companies and their margins of solvency, 36
Green card cover within EEC, (PQ) 393
Insurance Brokers Registration Council: establishment order, (SI) 318; government nominees named, 212
Insurance Companies Act 1974: authorisations and revocations: 1977, Sept-Oct, 320; Nov, 546
Insurance companies investment and assets, (ST): 1976, 298
MMC report on fire insurance, (PQ) 496
Policyholders' Protection Board: members appointed, 384
Small insurance companies, (PQ) 330
Insurance Brokers' Registration Council
see Insurance
Interest relief grants
see Regional development
Intergovernmental Maritime Consultative Organisation
International Convention for the Safety of Life at Sea 1974 ratified by UK, 130
International Maritime Dangerous Goods Code: new edition, 130
London meeting, 268
Maritime Safety and Marine Environment Protection Committees: consider proposals on tanker safety and pollution prevention, 130
Intermediate areas
see Regional development
International Aeradio Ltd
Develop airport security system, 73
International Business Information Inc
Japanese Corporate Finance 1977-80, (BN) 264
International Chamber of Commerce
Conference on European Business in world development, 208, (LA) 270
International Labour Office
Night Work, (BN) 72
Protection of Workers Against Noise and Vibration in the Working Environment, (BN) 72
Women at Work: no 1, (BN) 72
International Monetary Fund
Decisive turn in pace of inflation: letter by Chancellor of the Exchequer, (LA) 621
International Trade Centre
Confectionery in France, (BN) 18
Confectionery in the Federal Republic of Germany, (BN) 18
Operating a Trade Information Service: a handbook for developing countries,(BN) 120
Invest in Britain Bureau
see Investment
Investment
(see also Capital expenditure; Securities)
Industry's investment intentions for 1977 and 1978, (ST) 47
Insurance companies investments and assets, (ST): 1976, 298
Invest in Britain Bureau: operating costs, (PQ) 330; organises seminar in Copenhagen to attract Danish investment to UK, 380; organises seminar in the Hague to attract Dutch investment to UK, 162
Investment climate better than ever, (Sp) 418
Investment in the Community in 1976 and its Financing, 395
Investments of private pension funds, (ST): 1976, 303
Manufacturing industry investment, (PQ) 430, (PQ) 492
Proportion of gnp to investment 1948-76, (PQ) 430
Invisible earnings
see Invisible exports
Invisible exports
Construction industry's invisible earnings, (Sp) 397
Earnings in 3rd qtr 1977, 544
Trends in invisble transactions, (ST): 1976, 44
IPC Marketing Services
The Biscuit Market in the UK, (BN) 18
Iran
Hints to Businessmen, revised edition, 640
Survey of oil, gas and petrochemical industries in Iran, 130
Iraq
Arabic language law guideline, 97
Goods imported through Syria, 137
Hints to Businessmen, revised edition, 640
Irish Republic
Double taxation convention signed, 640
Economic indicators of the industrial countries, (ST): 41, 244, 461
Food regulations: marketing standards for eggs, 458
Iron and steel
(see also British Steel Corporation; European Coal and Steel Community)
EEC loans and grants for iron and steel projects, (PQ) 633
Export licensing see Export licensing
Imports of quasi flake moulds, (PQ) 497
Scrap imports and exports, (PQ) 429
Steel
Consumption and stocks, (ST): 1977, 2nd qtr, 51; 3rd qtr, 365
EEC: adopts measures to end steelmarket disruption, 618; decision allows steel companies to reduce coking coal and coke quotas, 126; discussions on the future of the steel industry, 436, (PQ) 493; loans for research, (PQ) 633; prices of steel products, (PQ) 493
Imports: and exports 1972-77, (PQ) 555; Jan-Oct 1977, (PQ) 498; from Comecon, (PQ) 495; of steel pipes from Japan, (PQ) 631
Mild steel production, imports and exports, (PQ) 431
Ministers meet TUC steel committee, 418
Private sector production of special steels, (PQ) 554
Scottish steel works, (PQ) 636
Suppliers of UK market, (PQ) 552
Uk steel pipeline factories, (PQ) 632
World prices, (PQ) 431
Isovel International Ltd
Develop air conditioning unit for computer rooms, 173
Israel
Food regulations: changes, 352
Import duties: surcharges, 589; tariff changes, 195, 352, 589
Import regulations: marking and labelling regulations, 282; tartrazine in medicines, 33

Israel—*continued*
Prime Minister to visit UK, 180
Regulations on medical preparations, 589
Standards: petroleum products and ceramic sinks, 33; Portland cement, 589
UK/Israel joint committee: second meeting, 65, (LA) 129
VAT rate: increase, 352
Italy
Customs posts for clearance of animals and meat, 353
Decree: petroleum products, 33; road transport of goods, 33, (*correction*) 353; surveillance of certain textile products, 589
Economic indicators of the industrial countries, (ST): 41, 244, 461
Import regulations: certificates of origin, 353
Labelling of textile products, 512
Visit by John Silkin, 126
ITM (Offshore) Ltd
Organise load out of wellhead module, 66
Ivory Coast
Development plan 1976-80, 353
Hints to Businessmen, revised edition, 335
Stability and growth go hand-in-hand: *market report*, (LA) 579, (*correction*) 639

J

Jamaica
Exchange rates, 649
Jamaica State Trading Corporation: formation, 513
Japan
BOTB special adviser appointed, 397
Department of Industry mission visits Japan, 161
Economic indicators of the industrial countries, (ST): 41, 244, 461
Exporting to Japan seminar, 129
Great hopes for Japanese investment in UK, (Sp) 257
Japanese Corporate Finance 1977-80, (BN) 264
The Japanese Market for Combustion and Heat Treatment Equipment: BOTB report, 269
Law: noxious substances in household products, 97
Store promotion techniques, (LA) 271
Visit by Roy Jenkins, 65
Jenkins, Roy
Delivers Jean Monnet Lecture on subject of monetary union, (LA) 286
Visits Japan, 65
JET
see Atomic energy – Joint European Torus
Jewellery
Exhibitions and fairs: Paris, 92
Jobs
see Employment
Johnson (R.C.) International
Export Intelligence Service helps win export order, 181
Johnson-Stephens (Gordon) Ltd
Merger not referred to MMC, 384
Joint European Torus
see Atomic energy
Jordan
Hints to Businessmen, revised edition, 23
Jordan Dataquest Ltd
Motor Distributors: BLMC, (BN) 120
Motor Distributors: Ford, (BN) 120
Motor Distributors: Miscellaneous, (BN) 120
Judd, Frank, Minister of State, Foreign and Commonwealth Office
Addresses Lions International Europe Forum, (Sp) 37

K

K Shoemakers Ltd
Occupy advance factory at Barrow, 317
Kangol Wear Ltd
Occupy advance factory at Cleator Moor, 485
Kaufman, Gerald, Minister of State, Department of Industry
Consumer representatives wanted for Post Office Board, (Sp) 164
Kayaks
see Boats
Kaye, Sir Emmanuel
Appointed member of the Reviewing Committee on the Export of Works of Art, 27
Keyser, Ethel de
Guide to World Commodity Markets, (BN) 428
King, David
Health and Safety Literature: a selective list of materials held by the SRL, (BN) 386
Knitwear
Import licensing *see* Import licensing
Index of production of hosiery and other knitted goods, (ST): 1977, Aug, 306; Sept, 668
Korea (Republic)
Import licensing: changes, 353, 650
Value added tax and special excise tax introduced, 404
Kwikform Ltd
Merger not referred to MMC, 118
Kysor Industries (GB) Ltd
Develop engine shutters for dust carts, 76

L

Laboratories
Laboratories Investigation Unit of the DES: work and research, 221
Laboratory equipment
(*see also* Scientific instruments)
Bench-top sterilisers developed, 219
Exhibitions and fairs: Amsterdam, 236; Tokyo, 347
Government assistance to the laboratory equipment industry, (PQ) 431
Microconcentrator developed, 19
Laboratory of the Government Chemist
Dispersal plans, (PQ) 496
Lacy, George
Addresses Shaping Tomorrow conference in Birmingham, (Sp) 4
Laker Airways
Skytrain frequency restriction removed, 7
Lankro Chemicals Group Ltd
Merger not referred to MMC, 384
Lansing Bagnall Ltd
Develop fork-lift truck for oil rigs, 324
Larkam, Richard Dick
see Dick-Larkam, Richard
Lathes
see Machine tools
Latin America
(*see also individual countries*, eg Brazil, Chile, etc)
Export services, 508
UNIDO discussions on industrial projects, 84
Layout
see Design
Leather
Exhibitions and fairs: Paris, 92
Lebanon
Import duties: carpets and rugs, 649; tariff changes, 283, 589
Pharmaceutical pricing regulations, 283
Leeds Chamber of Commerce and Industry
Export mission to North America, 182
Leicester Chamber of Commerce and Industry
Export missions: Kenya and Tanzania, 269
Leicester University
see University of Leicester
Lever, Harold
Addresses conference: Small Firms in the Inner Cities, (Sp) 420
Li Chiang, Chinese Minister of Foreign Trade
UK visit, 419, 639
Liberia
Import duties: tariff changes, 405
Libya
Import licensing: clothing, 283; pottery and glass, and certain foods, 649
Lickorish, Leonard, Director-General, British Tourist Authority
Addresses New York travel promoters, 448
Linda, Remo
Methodology of Concentration Analysis Applied to the Study of Industries and Markets, (BN) 386
Linear Motors Ltd
Develop mining train driven by linear motors, 388
Liquidation
see Bankruptcy
Liverpool
see Merseyside
Livestock
Horses: export of horse carcasses, (PQ) 330
Lloyds Register of Shipping
Lloyd's Calendar and Nautical Yearbook 1978, (BN) 386
Local government
Inner urban areas bill published, 620
London and European Group Ltd
Merger not referred to MMC, 260
London Capital Group Ltd
Inspectors' report, (PQ) 223; published, 627; results of report, (PQ) 635
London Chamber of Commerce and Industry
Conference: trading with the USSR, 448
Export missions: New Zealand and Australia, 336; Singapore and Manila, 398
Seminars: Doing Business in Argentina, 131; Exporting to Japan, 129; Product Liability Insurance, (Sp) 210, 385; Productivity, 425
London Metal Exchange
Control arrangements, (PQ) 223
Lonrho
Merger not referred to MMC, 260
Luxembourg
Decrees: aerosols, 456; lead content of petrol, 456
Economic indicators of the industrial countries, (ST) 41, 244, 461
Food regulations: preservatives, 456
Hints to Businessmen, revised edition, 129

M

Mabon, Dr J. Dickson, Minister of State, Department of Energy
Addresses Institution of Gas Engineers, (Sp) 423
Mach Frictions Ltd
Occupy advance factory at Birkenhead, 211
Machine Tool Trades Association
Export missions: South Korea, 337
Machine tools
(*see also* Hand tools)
Adjustable drill-stops developed, 548
Automatic capstan lathe developed, 19
Drop Forging Industry Scheme established, 256
Exhibitions and fairs: Hanover, 23, 89
Fast screwdriver developed, 219
Government assistance and protection, (PQ) 431
Imports of hobbing machines, (PQ) 431
Machine Tool Industry Scheme: assistance approved to date, (PQ) 223; to end, 382
Metal sawing machine developed, 489
Metal-working machine tools: sales and orders, (ST): 1977, July, 199; Aug, 518
Metric range of dowel drills developed, 324
Quick change drill holder developed, 265
Turning tool for hydraulic rams developed, 630
Machinery
(*see also* Hydraulics)
Electro-hydraulic swing-arm cutting press developed, 20
Nylon hub for small pneumatic tyres developed, 20
Terms of trade index movement, (PQ) 492
UK mining machinery 1977, (LA) 10, 65
McKintosh, Sir Ronald
Retires as director-general of NEDO, 116
Mackie (James) and Son Ltd
ECGD guarantees withheld, (PQ) 327, (PQ) 329
McLaren (Andrew) Ltd
Pram buggies: orders at Cologne Fair, 93, 192
Maclennan, Robert, Parliamentary Under-Secretary, Department of Prices and Consumer Protection
Addresses an international symposium on consumer information, (Sp) 437
Visits S Yorkshire's consumer advice centres, 382
McMahon, George, Director of BOTB's Export Data Branch
Export intelligence – 25 million cards on, (LA) 184
Malaysia
Hints to Businessmen, revised edition, 640
Import duties: arsenic, 405; buttons, 353; changes, 456; diesel fuel, 353, 405; iron, 405; locks and padlocks, 649; plastics, 353; shovels and spades, 195; sodium hydroxide (caustic soda), 354; straight-saws, 405; television monitors and parts, 354; transmission belts, 405; tyres, 353
Import licensing: changes, 353; diesel fuel, 405; fish meal, 405; hand tools, 195; oil filters and air filters, 649
Sales tax: precious metals, jewels and jewellery, 649
Malta
Food regulations: canned food, 513; preservatives, 589
Import licensing: vehicle engines, 283; video games, 649
Import regulations: pesticides, 240
Malta Development Corporation
Appointment of UK representative, 26
Man-made fibres
(*see also* Textiles)
Deliveries, (ST): 1977, 2nd qtr, 305; 3rd qtr, 519
Production, (ST): 1977, Aug, 305; Sept, 519
Production, quarterly analysis, (ST): 1977, 2nd qtr, 306; 3rd qtr, 519
Management
(*see also* British Institute of Management)
Management Characteristics and Labour Conflict: a Study of Managerial Organisation Attitudes and Industrial Relations, (BN) 18
Product Innovation and Development, (BN) 264
Manganese
see Metals
Manpower Services Commission
Five-year plan for Scotland published, 256
Training for Skills: a programme for action, 483
Manpower Services Committee for Scotland
Chairman appointed, 320
Manufactures
(*see also* Industrial production)
Capital expenditure, (ST): 1977, 3rd qtr, (provisional) 470, (revised) 619
Exhibitions and fairs: Baghdad, 93
Geographical analysis of UK imports of finished manufactures classified by end-use 1976, (ST) 603
Manufacturers' and distributors' stocks, (ST): 1977, 3rd qtr, (provisional) 472, (revised) 619
Manufacturers' stocks: monthly estimate, (ST): 1977, Aug, 200; Sept, 472
Output prices, (PQ) 551
UK exports of manufactured goods as proportion of total UK exports, (PQ) 433
UK imports of manufactured goods, (PQ) 632
Manufacturing investment
see Investment
Marcus Engineering (Wirral) Co Ltd
Occupy advance factory at Birkenhead, 69
Marine engineering
see Marine technology; Shipbuilding
Marine equipment
see Shipbuilding
Marine safety
(*see also* Coastguard, HM; Diving)
Compressed air breathing apparatus developed, 124
First-aid equipment on stand-by vessels, (PQ) 430
Fishing Industry Safety Group: interim report, (LA) 426, (PQ) 497

continued

Marine Safety—*continued*
Fishing vessel survey fees reduced, 257, (PQ) 432
International Convention for the Safety of Life at Sea 1974 ratified by UK, 130
International Maritime Dangerous Goods Code: new edition, 130
Pilotage Board establishment, (PQ) 434
Pilotage in the Thames, (PQ) 434
Survey: precise underwater system developed, 323
Survival radio for ships, (PQ) 430
Tanker safety and pollution prevention: IMCO consider proposals, 130
UK/China agreement on ship's technical survey and classification, 446
UK/Germany agreement on ships' safety equipment inspection, 397
Use of intermediate bulk containers for hazardous goods, (PQ) 327
Marine survey
see Marine safety
Marine technology
(*see also* Offshore oil and gas industry; Shipbuilding)
New marine gas turbine engine developed, 174
New range of jetty hooks developed, 124
Recommendations for the Design and Construction of Concrete Sea Structures, (BN) 488
Market reports
see Foreign trade, UK
Market Research Society
Seminar on export planning and research in Birmingham, 23
Marketing
(*see also* Export trade promotion)
Export services, 31, 508
Marlais Engineering Co Ltd
Occupy advance factory at Ammanford, 70
Marsh, David
The Confederation of British Industry, (BN) 264
Martindale Protection Ltd
Develop emergency respiration unit, 19
Matbo Ltd
Develop pneumatic-tyred battery electric forklifts, 548
Materials handling
Cranes: heavy-duty cranes developed, 387; modified Caledonian 90-ton Grove crane building A9 road, 168
'Endless' conveyor system developed, 388
Exhibitions and fairs: Singapore, 2, 276
Export services, 30, 402
Loader for long containers developed, 20
Materials Handling: Pallet Usage and Wastage, 319
National Materials Handling Centre: seminar on layout planning techniques, 326
Order picker developed, 629
Pneumatic-tyred battery electric forklifts developed, 548
Range of industrial grabs developed, 74
Robot handling device developed, 124
Seminars: bulk materials handling, 549; electromechanical handling equipment in engineering industries by UN, 573
Telescopic handler developed, 173
Vibrating screen separator developed, 548
Winch designed for radio masts, 491
Materials testing
see Non-destructive testing
Mauritius
Import duties: changes, 137
Import licensing: import controls, 513
Import regulations: second hand motor vehicles, 137
Meacher, Michael, Parliamentary Under-Secretary, Department of Trade
Addresses: British Resorts Association, (Sp) 319; Institute of Export, (Sp) 502
Statement on current textile import negotiations, 331
To speak at Institute of Export annual conference, 337
To visit Lagos International Trade Fair, 348
Measurement
see Weights and measures
Measuring and Process Control Ltd
Develop order picker, 629
Mechanical engineering
see Engineering
Medical equipment and supplies
Emergency respiration unit developed, 19
Exhibitions and fairs: Amsterdam, 28, 236; Dubai, 397; Madrid, 85, 270, 346; Paris, 236
Low temperature steriliser developed, 20
Medical isolator system developed, 491
Proprietary medicines: Price Commission examination, 117
Soft contact lens developed, 73
Surgical trolley which packs flat is developed, 489
Medicines
see Medical equipment and supplies
Membrain Ltd
Develop microcomputer-based automatic test and fault-finding equipment, 125
Merchant shipping
see Shipbuilding; Shipping
Mergers
(*see also* Monopolies and Mergers Commission)
Acquisitions and mergers of industrial and commercial companies, (ST): 1977, 3rd qtr, 293
Company Investigations June-Dec 1977, (PQ) 551
Consent given to takeover of Swain and Co Ltd by Guardian and Manchester Evening News Ltd, 384
Merger references laid aside by MMC
British Electronic Controls Ltd, 425
Derritron Ltd, 425

Mergers—*continued*
Mergers not referred to MMC
Allied London Properties, 118
Amalgamated Industrials Ltd, 66
American Standard Incorporated, 66
Associated Fisheries Ltd, 425
BICC Ltd, 260
Black Diamonds Pensions Ltd, 425
British Investment Trust Ltd, 425
British Olivetti Ltd, 544
Britrailpen Ltd, 425
Carliol Investment Trust Ltd, 384
Celestion Industries Ltd, 384
Clayton Dewandre Holdings Ltd, 66
Colmant et Cuvelier SA, 168
Diamond Shamrock Corporation, 384
Dorman Smith Holdings Ltd, 260
Dunlop Holdings Ltd, 168
Edinburgh and Dundee Investment Co Ltd, 425
Ega Holdings Ltd, 168
Gordon Johnson-Stephens Ltd, 384
Heron Corporation Ltd, 544
House of Fraser, 260
John Holt and Co (Liverpool) Ltd, 544
Kwikform Ltd, 118
Lankro Chemicals Group Ltd, 384
London and European Group Ltd, 260
Lonrho, 260
MK Electric Holdings Ltd, 168
Morgan Grampian Ltd, 627
National Insurance and Guarantee Corporation Ltd, 544
O. C. Summers (Holdings) Ltd, 260
Peachey Property Corporation, 118
Richard Costain Ltd, 118
Ross Foods Ltd, 425
SCM Corporation, 544
Security Pacific Finance Ltd, 425
Tagis Investments Ltd, 66
Trafalgar House Ltd, 627
TRF Pland Ltd, 544
Tyneside Investment Trust Ltd, 384
United Kingdom Guarantee Corp Ltd, 425
West of England Trust Ltd, 384
Wood Bastow Holdings Ltd, 384
Mergers referred to MMC
Bisgood, Bishop and Co Ltd, 168, 262
British Electronic Controls Ltd, 212
Derritron Ltd, 212
Redfearn National Glass Ltd, 66, 260
Rheem International Inc, 66
Rockware Group Ltd, 66
Smith Bros Ltd, 168, 262
United Glass Ltd, 66, 260
Mersey Docks and Harbour Co
1978 revised charges, 639
Merseyside
Liverpool Partnership Committee, (PQ) 389
NEB: recommendations, (PQ) 430; report, (PQ) 391, (PQ) 495
Regional assistance, (PQ) 390, (PQ) 433
Tourist trade, (PQ) 429
Visit by Alan Williams, (PQ) 392
Merseyside Chamber of Commerce and Industry
Seminar on systematic export documentation, 183
Metal Box Ltd
Price Commission allows interim price increase, 3
Metals
(*see also* Iron and steel; London Metal Exchange)
Export licensing *see* Export licensing
Low temperature metal re-building process developed, 323
Manganese: commodity agreement for manganese, (PQ) 222
Metal maintenance system in one package developed, 73
Metal spraying repair success, 21
Tungsten: commodity agreement for tungsten, (PQ) 222
Meteorology
European meteorological satellite launched, 435
Metra Consulting Group Ltd
Indonesia: business opportunities, (BN) 120
Metrication
Air-pressure gauges go metric, 624
Excise duties on hydrocarbon oil, petrol substitutes, power alcohol and gas, 424
Metrication Board
Proposes timetable for metrication in retailing, 624
Metwirral Ltd
Occupy advance factory at Birkenhead, 543
Mexico
Canning House Seminar, 86, (Sp) 228
Microscopes
see Scientific instruments
Middle East
(*see also individual countries*, eg Iraq, Lebanon)
Arab Insurance Conference 77, 24
Seminar on transporting materials and components to the Middle East, 269
Military equipment
Exhibitions and fairs: Wiesbaden, 192
Miniaturised cooling system developed, 74
Milk
see Dairy products
Minerals
Silica: Mineral Resources Consultative Committee Report, 424

Mining
(*see also* Coal)
Mine locomotive for steep gradients developed, 629
Train driven by linear motors developed, 388
UK mining machinery 1977, (LA) 10, 65
Ministry of Overseas Development
(*see also under name of Minister*, ie Hart, Judith)
Bilateral aid programme: small proportion made available, 444
Loan for electricity supply line in the Seychelles, 397
Report by the Committee of Inquiry appointed by the Minister of Overseas Development into the circumstances which led to the Crown Agents requesting financial assistance from the government in 1974, 486
Tied loans: yields for UK industry, Oct, 444
Mitchell, Austin
Appointed Parliamentary private secretary to John Fraser, 485
MJP Machinery Ltd
Develop 'endless' conveyor system, 388
MK Electric Holdings Ltd
Merger not referred to MMC, 168
Mobile homes
see Caravans
Moneylending
(*see also* Banking)
Moneylenders Acts: list of exemptions, 170
Protection of Depositors Act: companies treated as banking or discount companies, 171
Monopolies and Mergers Commission
Company investigations June-Dec 1977, (PQ) 551
Complementary role with Price Commission, (Sp) 3
Members, salaries and occupations, (PQ) 551
Merger references *see* Mergers
References: ceramic sanitary ware, extended, 544; gas appliances, 486; wholesale supply of newspapers, extended, 319
Reports: architect's and surveyors' scale fees, 318; flour and bread, (PQ) 636; fire insurance, (PQ) 496
Monsanto Ltd
Develop rubber density measuring equipment, 489
Morgan Grampian Ltd
Merger not referred to MMC, 627
Morocco
EEC/Morocco trade agreement on olive oil, 334
Import duties: cheese, hydrocarbons, 457; tractors, 649
Morris (B. O.) Ltd
Develop: adjustable drill-stops, 548; quick change drill holder, 265
Morris (Herbert) Ltd
Develop heavy-duty cranes, 387
Morris, John, Secretary of State for Wales
Leads Department of Industry mission to Japan, 161
Statement on Japanese investment in UK, 257
Motor cycles
see Cycles
Motor industry
(*see also* Caravans; Cycles; Diesel engines; Petroleum; Road transport)
The economy-related indicators: new cars registered (*Published in all numbers*)
EEC directive on rear view mirrors, 37
Electric vehicles: state of development, 163, (PQ) 223; three electric delivery vehicles to operate in Greater London, 378
Engine shutters for dust carts developed, 76
Exhibitions and fairs: Chicago, 452; Frankfurt, 28; Paris, 348; Tokyo, 85, 136, 452
Exports to Japan 1977, (PQ) 553
Fuel consumption tests for new cars, (SI) 64
Import penetration by Japanese cars, (PQ) 328
Imports of motor light bulbs, (PQ) 328
Index nos of turnover, (ST): 1977, 3rd qtr, 408
Motor Distributors: BLMC, (BN) 120
Motor Distributors: Ford, (BN) 120
Motor Distributors: Miscellaneous, (BN) 120
People at Work, (BN) 72
Plastic trim for cars developed, 630
Production of cars and commercial vehicles, (ST): 1977, Sept, (provisional) 105, (revised) 295; Oct, (provisional) 294, (revised) 469; Nov, (provisional) 482, 615
Remedial car for young children developed, 269
Sales forecasts, (PQ) 434
Trading balance with certain countries, (PQ) 328
UK share of home car market, (PQ) 632
Mouldmation Ltd
Develop robot handling device, 124
Mozambique
Foreign exchange transactions, 354
Mueller, Anne
Appointed Deputy Secretary Department of Industry with regional responsibilities, 623
Industrial efficiency and government policy, (LA) 121
Multi-fibre arrangement
see General Agreement on Tariffs and Trade
Multinational companies
see Companies
Musical instruments
Use of solid state control systems in church organs developed, 267

N

Namibia
Value of British assets, (PQ) 498

NASA
see National Aeronautics and Space Administration
National Advisory Council on Education for Industry and Commerce
To be wound up, 320
National Aeronautics and Space Administration
Two space telescope contracts awarded to BAC, 64, 325
National Association of Citizens' Advice Bureaux
Government grants 1977-78, (PQ) 632, (PQ) 633; Yorkshire and Humberside, (PQ) 633
National Coal Board
Contracts for international experimental facility on fluidised bed coal combustion announced, 325
Develop mining train driven by linear motors, 388
Investment in Thurcroft Colliery, 483
UK mining machinery 1977, (LA) 10, 65
National Committee on Computer Networks
see Computers
National Computing Centre Ltd
Computerguide 13: production control implementation, (BN) 488
Fault Diagnosis in Data Communications, (BN) 488
Taking part in EEC survey on Cobol compatibility, 395
National Consumer Council
The Bulk Buy Book, (BN) 628
National Economic Development Office
Director-General retires, 116
Foundrymen's Views: an attitude study in the ferrous foundries industry: report from Ferrous Foundries EDC, (BN) 264
Training with Europe: report from International Freight Movement EDC, (LA) 438
National Engineering Laboratory
Develop 'Asnel' automatic tunnel guidance system, 12
Fluid Flow Measurement in the mid-1970s, 549
National Enterprise Board
Accepts resignation of Sir Richard Dobson as chairman of British Leyland Ltd, 162
Acquires Fairey Company Ltd subsidiaries, 544
Capital debt, (PQ) 430
Companies acquired and disposed of, (PQ) 552
Director's (Mr J. L. Dickinson) pay, (PQ) 434
Disposal of investments, (PQ) 493
Financial duties: in respect of British Leyland and Rolls-Royce Ltd, (PQ) 497; stipulated by Secretary of State for Industry, 484
Government assessment of its performance, (PQ) 497
Investment Potential in the North East and North West of England: government reaction, (PQ) 329
Loans to British Leyland, 4
Members and salaries, (PQ) 493
Members: appointed, 64; interests, (PQ) 393
Northern office's investment funds, (PQ) 391
Promotion of industrial democracy, (PQ) 433
Proposal for Liverpool office block, (PQ) 495
Publication of its corporate plan, (PQ) 389
Rate of return on capital, (PQ) 392
Recommendations for Merseyside, the NE and the NW, (PQ) 430, (PQ) 495
Regional boards for north and north-west: established, 256; appointments, (PQ) 494; budgets, (PQ) 434; north-west chairman appointed, 539
Regional boards for other areas, (PQ) 494
Regional investment, (PQ) 393
Shareholding in: Bull Motors (Ipswich) Ltd, 116; Hivent Ltd, 4; Systems Designers Ltd, 164
Site of new regional board, (PQ) 389
National Federation of Consumer Groups
see Consumer protection
National Film Development Fund
see Film industry
National Film Finance Corporation
see Film industry
National Freight Corporation
Develop electric-powered delivery van, 163
National income and expenditure
The economy-selected indicators (*Published in all numbers*)
National Insurance and Guarantee Corporation Ltd
Merger not referred to MMC, 544
National Maritime Institute
Hosts Fellowship of Engineering exhibition, 175
National Materials Handling Centre
see Materials handling
National Physical Laboratory
Fits fail-safe brake to 'Big Ben', 221
Preliminary Analysis of the Potential for Energy Conservation in Industry, 539
Spacelab telescope study, 22
Work on mining machinery, 11
National Research Development Corporation
Annual report, 266
National Water Council
see Water
NCB (IEA Services) Ltd
Announce contracts for international experimental facility on fluidised bed coal combustion, 325
The Near North
see Regional development
NEB
see National Enterprise Board
NEDO
see National Economic Development Office
Neptune International Corporation
Acquires Glenfield and Kennedy, 422
Netherlands
Decrees: lead and benzene content of light oil (petrol), 354; pharmaceuticals, 240
Double taxation talks, 640
Economic indicators of the industrial countries, (ST) 41, 244, 461
Invest in Britain Bureau organises seminar in the Hague to attract Dutch investment, 162
Springboard to Europe, (*insert* 21 October)
New Zealand
Hints to Businessmen, revised edition, 448
Import duties: tariff changes, 513; vinyl floor coverings, 513
Import regulations: seeds, 458
Industries Development Commission Inquiries: paper and paperboard, 34
Mini-budget, 458
New Zealand-Australia Free Trade Agreement (Nafta): proposed changes, 240
Newcastle
Work on new metro stations nears completion, 320
Newspapers
MMC report on wholesale supply delayed, 319
Niger
Hints to Businessmen, revised edition, 335
Nigeria
Curfews at Port Harcourt and Benin City, 405
Entry permit applications, 283
Exchange control, 137, 589
Import regulations: blank invoices, 240
Lagos: hotel accommodation, 97
Public holidays 1978, 196
Visit by David Ennals, 161
Where prospects are good but not easy: market report, (LA) 338
Night work
see Shift work
Noise
(*see also* Aircraft noise)
Protection of Workers Against Noise and Vibration in the Working Environment, (BN) 72
Non-destructive testing
Exhibitions and fairs: Tokyo, 86
Non-statutory organisations
Government grants, (PQ) 329
Noonday Graphics UK Ltd
Occupy advance factory at Knowsley, 623
Nordic Bank Ltd
Survey into the Experiences of Manufacturing Subsidiaries of Scandinavian Companies in the United Kingdom, 208, (LA) 263
Norfolk
North Norfolk: government assistance, (PQ) 492
North of England Development Council
see Regional development
North West Industrial Development Association
see Regional development
Northern Ireland
Investment by Dupont, 64
New companies registered in Northern Ireland, (ST): 1977, Aug, 56; Sept, 306; Oct, 477
Norway
Import duties: potato products, 649
Import licensing: cabbage and brussels sprouts, 649
Import regulations: potato products, 649
Price controls, 97
Nuclear Enterprises Ltd
Develop radiation contamination monitors, 21
Nuclear magnetic resonance
see Scientific instruments
Nuclear power
see Atomic energy
Nu-Swift International Ltd
Develop smoke detector and fire blanket, 173
Nuts and bolts
see Fasteners

O

Oakes, Gordon, Minister of State, Department of Education and Science
Visits United States and Canada, 2
OECD
see Organisation for Economic Co-operation and Development
Office equipment
Addresser for small businesses developed, 20
Attendance recording unit developed, 173
Exhibitions and fairs: National Exhibition Centre, 116
Franking machine developed, 124
Prefabricated office partitions developed, 387
Office location
(*see also* Industrial location; Regional development)
Office Development Permits, (ST): 1977, 3rd qtr, 468
Office of Fair Trading
(*see also* Borrie, Gordon; Consumer protection)
Code of practice for laundries and dry-cleaners monitored, 379
Register of Restrictive Trading Agreements: additions and amendments, 1977, 3rd qtr, 8
Research into advertising standards, 379
Stop and Think: guide to contracts, 419
Offshore Centre
see Offshore oil and gas industry
Offshore oil and gas industry
(*see also* Marine technology)
Fork-lift truck for oil rigs developed, 324
Gas terminals and gasfields visited by Tony Benn, 113
Helicopters: number and type used, (PQ) 553
International Business Workshop at the Offshore Centre, 117
New schemes for using offshore gas being investigated, 423
North Sea expenditure, 1978-80, 622
Oil terminal under construction in Shetland Isles, 622
Stand-by vessels, (PQ) 430
Offshore technology
see Marine technology
Oil
see Petroleum
Oil pollution
see Pollution
Oil refining
see Petroleum
Oman
Agency legislation, 34
Import regulations: fruit and vegetables from Cyprus, 34; sheep and goats, 650
Optical equipment
Fibre optic light guide developed, 20
Organisation for Economic Co-operation and Development
(*see also individual countries,* eg France, Japan, etc)
Collective Bargaining and Inflation: new relations between government, labour and management: final report on an international management seminar, (BN) 72
Consumer price indices for OECD countries Feb 1974-Sept 1977, (PQ) 550
Consumer Protection in the Field of Consumer Credit: report by the Committee on Consumer Policy, (BN) 628
Economic indicators of the industrial countries, (ST): 41, 244, 461
Rate of inflation for OECD countries Feb 1974-Sept 1977, (PQ) 550
Structural Problems of the Textile and Clothing Industry, (BN) 386
Working group's conclusions on steel, 505
Orudzhev, Mr, Soviet Minister for the Gas Industry
Visits UK, 181
Otaiba, Mana Saeed al-
Petroleum and the Economy of the United Arab Emirates, (BN) 547
Overseas business visits
see Visits overseas by businessmen
Overseas trade
see Foreign trade
Overseas travel
see Tourist trade
Owen, Dr David, Secretary of State for Foreign and Commonwealth Affairs
Support for enlarged EEC, 332
Visits W Germany, 77

P

Packaging
Automatic case sealer developed, 219
Exhibitions and fairs: Helsinki, 90; Johannesburg, 133; Tokyo, 337
Export services, 31, 508
Page, John
Appointed member of Sitpro Board, 335
Pakistan
Import duties: changes, 97
Pallets
see Materials handling
Panama
Import regulations: confectionery quotas, 240
Paper
Government assistance to paper industry, (PQ) 552, (PQ) 554
Imports of: paper and board, (PQ) 328; paper products, (PQ) 552; paperboard, (PQ) 634
Papermaking productivity increased by new machine, 318
Waste paper *see* Waste materials
Parkinson, C. Northcote
The Rise of Big Business, (BN) 322
Partnerships
see Companies
Patents
Conferences on applying for a European patent, 37
European Patent Organisation: inaugural meeting, 225
Patent Co-operation Treaty: UK deposits instrument of ratification, 505; UK ratification, (PQ) 330
Patents endorsed licences of right, 68, 118, 171, 212, 260, 321, 385, 424, 486, 545, 627
Pay
Breaches of pay settlements, (PQ) 329
Consultative paper on foreign earnings of self-employed issued by Inland Revenue, 319
The economy – selected indicators: hourly wage rates (*Published in all numbers*)
Indices of average earnings, (ST): 1977, Aug, 203; Sept, 477; Oct, 657
Indices of basic rates of wages, (ST): 1977, Sept, 203; Oct, 477; Nov, 657
Price and wage rises, (PQ) 551
Trends in real incomes, (ST) 105

Peachey Property Corporation
Merger not referred to MMC, 118
Pension funds
Investments of private pension funds, (ST): 1976, 303
Pepiware Ltd
Occupy advance factory at Birkenhead, 69
PERA
see Production Engineering Research Association
Perambulators and pushchairs
Pram buggies: orders at Cologne Fair, 93, 192
Performing Rights Society
Registration of restrictive trading agreements, (PQ) 496
Petrol
see Petroleum
Petroleum
(*see also* Offshore oil and gas industry; Pollution)
Imports, (PQ) 391, (PQ) 429
Petroleum and the Economy of the United Arab Emirates, (BN) 547
Retail prices, (PQ) 389, (PQ) 390, (PQ) 635
UK Refining and Petrochemicals: Facts and Opportunities, 22
Petter Refrigeration Ltd
Develop sub-zero transport refrigeration units, 548
PFC (Business Forms) Ltd
Develop range of computer stationery, 74
Philippines
Excise taxes: spirits, wines and fermented liquors, 589
Photographic equipment
Exhibitions and fairs: Paris, 277, 584
Export services, 402
Pilotage
see Marine safety
Pineapples
see Food
Pitney Bowes Ltd
Develop franking machine, 124
Planning agreements
see Industry
Plant
see Contractors plant and machinery; Materials handling; Power plant industry
Plasterboard
see Building materials
Plastics
Method of joining thermoplastic materials developed, 435
Plastic trim for cars developed, 630
Report on reclamation of mixed waste plastics, 175
Plessey Co Ltd
Testing of Plessey Doppler MLS azimuth system, 174
Pneumatics
see Compressed air; Hydraulics
Poland
UK/Poland joint commission: sixth meeting, 161; statement issued, (LA) 228, (*correction*) 270
UK/Poland shipbuilding contract: agreement signed, 378; almost signed, 2; constitution, (PQ) 554; effect on public sector borrowing requirement, (PQ) 496; engines supply, (PQ) 496; government assistance, (PQ) 330; government subsidy, 539; items from Poland, (PQ) 497; name of Polish State Holding Co, (PQ) 498; orders re-allocated, 418
Policyholders' Protection Board
see Insurance
Pollution
(*see also* Noise)
Exhibitions and fairs: Tokyo, 24
Proceedings of the 1977 Oil Spill Conference (Prevention, Behaviour, Control, Cleanup) Held at New Orleans, Louisiana, 8-10 March 1977, (BN) 547
Polytechnic of Central London
UK/Soviet seminar: Advances in the Control of Industrial Processes, 230
Portugal
Food regulations: sweeteners in soft drinks, 458
Import duties: sail cloth, 458
Import licensing: changes, 34, 283; rayon fibres, 354
Public expenditure restraints, 405
Post Office
Appendix to the Report of the Post Office Review Committee, 320
Financial targets: postal, (PQ) 637; telecommunications, (PQ) 637
Giro: departmental use of Giro, (PQ) 637; new services introduced, 3
Post Office Board: consumer representatives wanted, 164; list of members, (PQ) 632; managing director, telecommunications, appointed, 214; member appointed, 422
Study group set up to prepare future data service, 21
'Viewdata': first US demonstration, 84
We're Here to Help You: film, 174
Winch designed for radio masts, 491
Post Office Board
see Post Office
Post Office Review Committee
see Post Office
Potatoes
see Food
Pottery
see Ceramics
Power plant industry
(*see also* Electrical equipment)
Cost of power workers' strike, (PQ) 392
Emergency power supply system developed, 19
Government assistance, (PQ) 497
Prams
see Perambulators and pushchairs
Pressurised plant
(*see also* Compressed air)
Proposals for New Legislation for Pressurised Systems: consultative document, 491
Prevention of Fraud (Investment) Act 1958
see Securities
Price Commission
(*see also* Prices)
Administrative costs 1977-78, (PQ) 551
Beer Prices and Margins (Price Commission Report no. 31): discussions on the report, 625
Changes in Price Commission index, retail price index and wholesale price index, (ST): 1977, Sept, 104; Oct, 257, 362; Nov, 592
Complementary role with MMC, (Sp) 3
Effects of EEC rules of competition, (PQ) 635
Examinations: bank charges, 117, (PQ) 224; cab services, 626; road haulage, 208, 321; started since 1 Aug 1977, terms of directions, 117
Interim price increases: by area electricity boards of England and Wales and Metal Box Ltd allowed, 3; by Fisons Ltd allowed, 64; by UG Glass Containers allowed, 161
Investigations
British Rail charges, 258, (PQ) 430; fare increases limited to 20 per cent, 321
Cadbury Schweppes Foods Ltd, 486; price increases allowed, 626
Coal distributors in West Wales, 208
Currently taking place, (PQ) 327, (PQ) 551, (PQ) 633
Ever Ready Co (GB) Ltd, 423, (PQ) 496
Fisons Ltd, 6
Flour and bread price increases not to be investigated, 383
Imperial Chemical Industries Ltd, 626
Tate and Lyle Refineries Ltd, 212
UG Glass Containers Ltd, 118
Members, salaries and occupations, (PQ) 551
Policy of interim increases in prices, (PQ) 498
Price increases notified 1977, (PQ) 632
Report for the Period 1 June to 31 July 1977, 6
Report for the Period 1 August to 31 October 1977, 626
Report on distributors' margins on potatoes and other vegetables, 112
Report on school uniforms: effect of report, (PQ) 635
Prices
(*see also* Department of Prices and Consumer Protection; Price Commission; Retail prices; Wholesale prices)
Basingstoke consumer group makes third price survey, 485
Bread, (PQ) 224, 425, (PQ) 495
Contravention of the pricing rules, (PQ) 432
The economy – selected indicators: index numbers (*Published in all numbers*)
Effect of fall in commodity prices on retail prices, (PQ) 631
Flour, (PQ) 493
Food: effect of EEC membership, (PQ) 492; increases since Feb 1974, (PQ) 550; increases Oct 1976-77, (PQ) 550
Frozen chips, (PQ) 555
Manufactured food June 1975-Oct 1977, (PQ) 493
Petroleum, (PQ) 389, (PQ) 390, (PQ) 635
Potato products, (PQ) 393, (PQ) 550
Potatoes, (PQ) 498
Price and wage rises, (PQ) 551
Recommended prices, (PQ) 224
Retailers' overstamping of prices, (PQ) 389
Soft drinks: developments since Price Commission report, (PQ) 633
Unit pricing for meat, (PQ) 633
Vegetables, 544, (PQ) 550
Printing
Exhibitions and fairs: Algiers, 238; Chicago, 192
Printing Machinery Industry Scheme: end of scheme, 317; grants approved, (PQ) 552
Product and Process Development Scheme
Applications received and approved, (PQ) 496
Product development
see Management
Product liability
London C of C seminar on Product Liability Insurance, (Sp) 210, 385
Unfair Contract Terms Act 1977: government statement, 210; implications for business insurance, (Sp) 421; liability of partners, (PQ) 550
Production Engineering Research Association
Develop method of joining thermoplastic materials, 435
Productivity
London C of C seminar, 425
Protimeter Ltd
Develop moisture measuring system, 548
Public appointments
(*see also under name of body*, eg Post Office)
Non civil-service appointments: by Secretary of State for Industry, (PQ) 494; by Secretary of State for Prices and Consumer Protection, (PQ) 495; by Secretary of State for Trade, (PQ) 434
Publicity
see Advertising
Publishing
The Publishing Industry in Canada: a report, (BN) 264
Pushchairs
see Perambulators and pushchairs
PWR Systems Ltd
Government assistance, (PQ) 389

Q

Qatar
Hints to Businessmen, revised edition, 268
New bidding and tender regulations, 405
Quality control
see Engineering
Quebec
see Canada
Queen's Speech
Extracts, 259

R

Radio equipment
see Telecommunications
Ram Engineering Supplies Ltd
Occupy advance factory at Brighouse, 543
Rao, Dr Krishna
Develops production of hydrogen by photobiological energy conversion, 435
Raw materials
see Commodities
Redfearn National Glass Ltd
Merger referred to MMC, 66, 260
Reekie, W. Duncan
The Consumer Society, (BN) 18
Rees (David) (Foods) Ltd
Occupy advance factory at Blackpool, 211
Refrigeration
see Heating and ventilation
Regional development
(*see also* Industrial building; Industrial location; Office location)
Criteria for regional aid, (PQ) 393
Development areas: status refused for W Yorkshire area, (PQ) 329
EEC Regional Development Fund: advance factories contributions 1974-77, (PQ) 222; community regional policy, (PQ) 432; payments made and proposed, (PQ) 555; relationship between EEC national quota and national expenditure, (PQ) 551; UK allocations, (PQ) 330, 618, (PQ) 633
European Investment Bank scheme, 568
Industry Act 1972 assistance
Incentive grant for Co-op Bank project in Skelmersdale, 314
December deadline for N Yorkshire and Scottish applications, 3, 117
Disclosure of financial assistance, (PQ) 631
Interest relief grants: increased, 618; interest rate movement 1975-77, (PQ) 551; reduced, 160, 379
Loans at concessionary rates: increased, 618; interest rate movement 1975-77, (PQ) 551; reduced, 160, 379
Pulp, paper and converting industries, (PQ) 554
Timber and furniture industries, (PQ) 554
The Near North: special report, (*insert* 4 November)
North: EEC companies investment in the region, (PQ) 432; NEB regional board established, 256; Small Firms Counselling Service launched, 256
North East: government assistance 1974-76, (PQ) 431; NEB recommendations, (PQ) 430
North Norfolk: government assistance, (PQ) 492
North of England Development Council: government assistance, (PQ) 496
North West: government assistance, (PQ) 496; NEB recommendations, (PQ) 430; NEB regional board established, 256
North West Industrial Development Association: government assistance, (PQ) 496
Regional Development Grants: amounts paid 1972-77, (PQ) 327; criteria for grants, (PQ) 498; grant payments 1976-77, (PQ) 222, (PQ) 632; grant payments, 1977, 3rd qtr, (LA) 213, (*correction*) 320; intermediate areas, (PQ) 392
Regional selective assistance
Applications and offers, (ST): 1977, June-July, 296
Offers of £10,000 or more: list of companies receiving first payment, (ST): 1977, July-Sept, 411
Removal grants: basis of availability, (PQ) 329
South West: Devon and Cornwall Development Bureau given grant, 314
Yorkshire and Humberside: government assistance, (PQ) 330, (PQ) 496
Yorkshire and Humberside Development Association: government grants, (PQ) 392, (PQ) 496
Register of Restrictive Trading Agreements
see Office of Fair Trading
Registry of business names
see Companies Registration Office
Remploy Ltd
Exhibitions and fairs: Dusseldorf, 191
Republic of Ireland
see Irish Republic
Republic of Korea
see Korea (Republic)
Research Services Ltd
Survey into the Experiences of Manufacturing Subsidiaries of Scandinavian Companies in the United Kingdom, 208, (LA) 263
Retail prices
(*see also* Price Commission; Prices)
Changes in Price Commission index, retail price index

continued

Retail prices—*continued*
and wholesale price index, (ST): 1977, Sept, 104; Oct, 362; Nov, 592
The economy – selected indicators: retail prices (*Published in all numbers*)
EEC, Canada, Japan and USA June 1970-Sept 1977, (PQ) 632
Increases since Feb 1974, (PQ) 550
Number of price increases notified, (PQ) 550
Retail Price Index, (ST): 1977, Sept, 153; Oct, 408; Nov, 657
Retail Price Index movement: forecast trend, (PQ) 550; March 1974 to date, (PQ) 550
Retail trade
(*see also* Distribution; Wholesale trade)
The economy – selected indicators: retail sales index (*Published in all numbers*)
Index nos of value and volume of sales per week, (ST): 1977, Aug, (revised) 56; Sept, (provisional) 153, (revised) 296; Oct, (provisional) 362, (revised) 516; Nov, (provisional) 593
Inquiry into Retail Trading for 1976, (PQ) 224, (PQ) 327, (PQ) 433
Investigation of market dominance, (PQ) 432
Proposed metrication timetable, 624
Retailers' stocks, (ST): 1977, Aug, 106; Sept, 363; Oct, 592
VAT Special Schemes for Retailers: revised notice, 320
Reviewing Committee on the Export of Works of Art
Member appointed, 27
Reynolds Boughton Ltd
Develop mobile vehicle maintenance workshop, 324
Rheem International Inc
Merger referred to MMC, 66
Road haulage
see Road transport
Road transport
(*see also* Transport and Road Research Laboratory)
Committees appointed: to inquire into all aspects of motorway service, 422; to review the system of licensing of operators of goods vehicles, 624
EC Commission: adopts certain measures, 285; institutes legal proceedings against UK over tachograph, 176
EEC ministers agree transport regulations amendment, 225
EEC to participate in electronic traffic aid study, 285
Export services, 30, 31, 134, 402, 403, 646, 647
Fee rise for HGV driving tests, 618
Price Commission examinations: cab services, 626; road haulage industry, 208
Road haulage permits: quotas for Italy and Portugal raised, 572; required for Turkey, 639
UK/Iraq road haulage agreement, 573
UK proposals on drivers' hours put to EC Commission, 437
Roads
see Civil engineering
Roberts, David
Management Characteristics and Labour Conflicts: A Study of Managerial Organisation Attitudes and Industrial Relations, (BN) 18
Roberts, Geoffrey
Management Characteristics and Labour Conflicts: a Study of Managerial Organisation Attitudes and Industrial Relations, (BN) 18
Robophone Ltd
Develop small telephone answering machine, 173
Rockware Group Ltd
Merger referred to MMC, 66
Rolls-Royce Ltd
Develop new marine gas turbine engine, 174
NEB's financial duties, (PQ) 497
Ross Foods Ltd
Merger not referred to MMC, 425
Rototherm Ltd
Develop electronic temperature indicator, 19
Royal Commission on the Distribution of Income and Wealth
see Income and wealth
RTZ Ltd
Statement by Department of Trade on RTZ Ltd v Westinghouse, 66
Rubber
Commodity agreement for natural rubber, (PQ) 222
Rubber density measuring equipment developed, 489
Russia
see Union of Soviet Socialist Republics
Ryder, Charles, Department of Energy
States domestic insulation can produce vast energy savings, 75

S

Safety
(*see also* Air safety; Health and Safety Commission; Health and Safety Executive; Marine safety)
Exhibitions and fairs: Denver, 133; Dusseldorf, 229, 645
Fire precautions: fire alarm control panels developed, 74
Fireworks: 1977 firework safety campaign, 160; observation of fireworks agreements, (PQ) 224
Health and Safety Literature: a selective list of materials held by the SRL, (BN) 386
Safety—*continued*
Industry should make safety plans now, (Sp) 118
New home safety data expected, (Sp) 6
Smoke and fume exhaust ventilator developed, 219
Smoke detector and fire blanket developed, 173
Smoke detector tester developed at Harwell, 174
St Kitts-Nevis
Import licensing: varnishes, 196
St Vincent
Import licensing: changes, 650
Satellites
European meteorological satellite launched, 435
Saudi Arabia
Food standards, 514
Saudi International Bank
Government grant, (PQ) 393
Scandinavia
(*see also* Denmark; Finland; Norway; Sweden)
Survey into the Experiences of Manufacturing Subsidiaries of Scandinavian Companies in the United Kingdom, 208, (LA) 263
Scanlon, Hugh
Appointed member of NEB, 64
Science
Changes in the Population of Persons with Qualifications in Engineering, Technology and Science 1959 to 1976: report, 161
Government expenditure, (PQ) 429, (PQ) 432
A Salute to British Genius, (BN) 172
Science and Technology Regional Organisations
Receive government assistance to support local school/industry links, 540
Science Reference Library
see British Library
Science Research Council
Awards grant to Dr P. Dunnill to study effects of processing operations on proteins, 76
HVEM: A summary of work on the SRC high-voltage electron microscopes, 1971-76, 75
Scientific instruments
(*see also* Laboratory equipment)
Diamond wire saw to avoid crystal damage developed, 324
Exhibitions and fairs: Amsterdam, 236; Dusseldorf, 189; Seoul, 93
HVEM: A summary of work on the SRC high-voltage electron microscopes, 1971-76, 75
Infra-red thickness monitor developed, 630
Low-cost digital thermometer developed, 323
Nuclear magnetic resonance spectrometer developed, 267
SCM Corporation
Merger not referred to MMC, 544
Scotland
Assisted areas: December deadline for applications, 3, 117
EIB loans, 332, 443
Index nos of industrial production, (ST): 1977, 2nd qtr, 666
Manpower Services Commission's five-year plan for Scotland, 256
Manpower Services Committee for Scotland: chairman appointed, 320
Scotland bill: areas of ministerial responsibility, (PQ) 494, (PQ) 498
Scottish company records to be microfilmed, 257
Scottish Development Agency: to build first factory at Peffermill, Edinburgh, 542; to convert disused jute mills in Dundee, 542
Scottish Economic Planning Department: seminar on industrial expansion, 319
Scottish Council (Development and Industry)
Export missions: Iraq, 444; Mexico, 182
Scottish Development Agency
see Scotland
Scrap
see Iron and steel; Waste materials
'Seaforth Clansman'
First purpose-built diving support ship, 485
Securities
Amendments to the Prevention of Fraud (Investment) Act 1958: progress of legislation, (PQ) 494
Licensed and exempted dealers in securities: amendments to list, 70, 262, 545
Security Pacific Finance Ltd
Merger not referred to MMC, 425
Security systems and equipment
Exhibitions and fairs: Utrecht, 346
Selective Investment Scheme
see Industry – Industry Act 1972 assistance
Services for exporters
see Export trade promotion *and under individual subject*
Setpoint Ltd
Occupy advance factory at Cardiff, 165
Seychelles
Trade marks decree 1977, 589
UK loan, 397
Sharples Photomechanics Ltd
Develop strain viewing instrument for glass, 73
Shift work
Night Work, (BN) 72
Shipbuilding
(*see also* Boats; British Shipbuilders; Marine technology)
Corporate plan for the industry, (PQ) 432
Credit facilities, (PQ) 429; shipbuilding credit scheme, (PQ) 635
Shipbuilding—*continued*
EC Commission's draft directive on aids to shipbuilding, (PQ) 492, (PQ) 634
Employment, (PQ) 434
Exhibitions and fairs: Chicago, 91, 132
First purpose-built diving support ship, 485
Government assistance to UK shipowners, (PQ) 632
New orders 1977, (PQ) 434
The Offshore Service Vessel Register 1977, (BN) 172
Rubber de-icer overshoe for radomes developed, 267
Shipbuilding intervention fund commitments to date, (PQ) 492
Ships launched in UK 1964-76, (PQ) 552
UK/Poland shipbuilding contract: agreement signed, 378; almost signed, 2; constitution, (PQ) 554; effect on public sector borrowing requirement, (PQ) 496; engines supply, (PQ) 496; government assistance, (PQ) 330; government subsidy, 539; items from Poland, (PQ) 497; name of Polish State Holding Co, (PQ) 498; orders re-allocated, 418
Shipping
(*see also* Fishing industry; Intergovernmental Maritime Consultative Organisation; Marine safety)
Export services, 30, 31, 134, 402, 403, 508, 509, 646, 647
Freedom by regulation on the horizon for shipping industry, (Sp) 484
International Maritime Dangerous Goods Code: new edition, 130
Lloyd's Calendar and Nautical Yearbook 1978, (BN) 386
Merchant Shipping (Certification of Marine Engineer Officers) Regulations 1977, (SI) 625
Merchant Shipping (Fees) Regulations 1977, (SI) 626
New forum for Commonwealth merchant shipping proposed, 379
UK shipping interests and the EEC, (PQ) 497
UK/USSR: talks on shipping issues, 112, (PQ) 327, (PQ) 328, (PQ) 329, (PQ) 497
Shoes
see Footwear
SIAT Packaging Systems Ltd
Develop automatic case sealer, 219
Siddall and Hilton (Hospital Furniture) Ltd
Develop hospital trolley which packs flat, 489
Sidwell, Barrie
Appointed director ECGD London Office, 161
Siebe Gorman and Co Ltd
Develop marine version of their compressed air breathing apparatus, 124
Sierra Leone
Commercial representation, 97
Import duties: tariff changes, 354
Import licences: application details, 196
Rescheduling of extended or medium term debts, 137
Silica
see Minerals
Silk, Leonard
The Economists, (BN) 488
Silkin, John, Minister of Agriculture, Fisheries and Food
Statement on EC Commission proposals: general, 126; Common Fisheries Policy, 225, 499, 568
Visits: Denmark for fisheries talks, 37; Italy, 126
Simplex Ltd
BOTB visit, 578
Simplification of International Trade Procedures Board
see Export trade procedure
Simpson Jersey Ltd
Develop fabrics with laid-in fancy yarns, 126
Singapore
Customs duty on travellers' baggage, 283, 354
Licensing of medicinal products, 589
Metrication: textiles, 650
Sino-British Trade Council
Seminar on new business opportunities in China, 131
SIRA Institute
Seminar on sampling systems for on-line process analysers, 630
SITPRO
see Export trade procedure
Skate-boards
see Sports equipment
Skelmersdale
Incentive grant for Co-op bank project in Skelmersdale, 314
Skytrain
see Laker Airways
Slater Walker Ltd
Financial details, (PQ) 223
Small firms
Annual export award, 24
Autumn Budget 1977 measures, 217
Collaboration among small firms encouraged, 314
Commitment to increased government support, (Sp) 163
Corby Development Corporation Jubilee Enterprise Exhibition, 421
Credit control for a small manufacturer, 259
Details of government assistance, (PQ) 327
Feasibility studies on computer aids, (PQ) 391
Overseas students on course studying development of small business enterprises, 183
Seminar: Starting Your Own Business, in Workington, 69
Series of one-day conferences for small firms in the inner cities, 162, (Sp) 420, 485, 542

continued

Small firms—*continued*
Small Firms Counselling Service launched in north, 256
Small Firms Information Centres: Luton receives 25 000th inquiry, 258
Starting and Running a Small Business, (BN) 322
Time spent on government paperwork, (PQ) 222
Small Firms Information Centres
see Small firms
Smith Bros Ltd
Merger referred to MMC, 168, 262
Smith, Derek, Head of ECGD's Comprehensive Guarantee Group
Addresses: Birmingham Chamber of Industry and Commerce export seminar, (Sp) 180; CBI seminar on export finance, (Sp) 229
Smith's Dock Co Ltd
Awarded mechanical maintenance contract by Phillips Petroleum, 259
Social security
EC Commission amends migrant workers social security schemes, 285
Soft drinks
see Beverages
Sohl, Dr Hans-Gunther
Leads German mission of senior industrialists and bankers to UK, 64, 114
Solar energy
see Energy
Somali Democratic Republic
Foreign investment law, 137
South Africa
African wages improve in British-owned subsidiaries, 638
Fertilisers, Farm Feeds, Agricultural Products and Stock Remedies Act 1977: provisions in force, 590
Food regulations: margarine, 590; milk and milk products, 650
Import duties: import surcharge, 590; tariff applications, 34, 97, 196, 241, 354, 458; tariff changes, 35, 196, 240, 354, 458, 590
Import permits, 138
Trade Metrology Act 1977, 650
UK attitude to EEC code of conduct on employment practices in South Africa, (PQ) 330
Value for customs duty purposes, 458
Value of British assets, (PQ) 498
South America
see Latin America
South East Asia Trade Advisory Group
Second joint Seatag/Indonesian Association reception, 230
South West Africa
see Namibia
Sovex Marshall Ltd
Develop loader for long containers, 20
Soviet Union
see Union of Soviet Socialist Republics
Sowerby
Government assistance, (PQ) 432
Space industry
see Aerospace industry
Spacelab
see Aerospace industry
Spain
Food regulations: addition of dioxide of titania to all products containing soya bean proteins, 458; cucumbers, 590; denaturing of powdered milk, 355; hake and whiting, 354; truffles, 590
Hints to Businessmen, revised edition, 640
Import duties: duty-free quotas, 197, 283; paraxylene, 197; petroleum products, 283; tariff changes, 458, 650; unalloyed unwrought aluminium and cellulose acetate flakes, 283
Import regulations: frames from EEC countries, 355
Joint assembly: nuclear reactor container, 406
Sports equipment
Exhibitions and fairs: Cologne, 90, 276; National Exhibition Centre, 182
Skate-boards: profit margins, (PQ) 434
SPR Chemicals Ltd
Occupy advance factory at Knowsley, 423
Sproxton, Alan
Starting and Running a Small Business, (BN) 322
Sri Lanka
Budget 1978, 459
Hints to Businessmen, revised edition, 448
Import duties: tariff changes, 590
Standardisation
see British Standards institution
Standing Conference on Schools, Science and Technology
To provide assistance to Science and Technology Regional Organisations, 540
Statistics
(*see also* Business Statistics Office *and under individual subject*)
Changes in 1978 UK overseas trade classification, (LA) 128
Inflation and means of measuring its rate, (Sp) 317
Inquiries received at National Exhibition Centre, Feb 1976-Dec 1977, 595
Need for reliable statistics, (Sp) 258
Release dates of economic statistics, 1977, Nov, 202; Dec, 413; 1978, Jan, 658
Statistics of Trade Act 1974: section 1 prosecutions, (PQ) 223
United Kingdom in figures, 102, 204
Steel
see Iron and steel
Stelmo International
Develop fully-automated plants for producing glass-reinforced cement sheets, 326
Sterling
see Foreign exchange
Sterling Cable Co Ltd
Employees praised for export successes, 397
Stewart, Margaret
Working Abroad: the Daily Telegraph guide to working and living overseas, (BN) 322
Stocks
The economy – selected indicators: changes in stocks (*Published in all numbers*)
Manufacturers' and distributors' stocks *see* Distribution
Retailers' stocks *see* Retail trade
Wholesalers' stocks *see* Distribution
Strachem Ltd
Develop tack cloth, 73
Strang, Gavin, Parliamentary Secretary, Ministry of Agriculture, Fisheries and Food
Addresses Guild of Agricultural Journalists, 225
Suarez, Adolfo, Spanish Prime Minister
Visits London, 176
Sugar
see Food
Summers (O.C.) (Holdings) Ltd
Merger not referred to MMC, 260
Surveyors
MMC report on scale fees, 318
Swain and Co Ltd
Consent given to takeover by Guardian and Manchester Evening News Ltd, 384
Swansea Jig and Tool Co
Develop high-speed nut-making machine, 423
Sweden
Double taxation discussion on death duties resumed, 444
Regulations providing for the compulsory approval of TV games, 98
Sweets
see Confectionery
Switzerland
Change of address of British consulate at Basle, 651
Syria
Fourth five-year plan 1976-80, 284
Import documentation, 459
Import duties: domestic refrigerators and refrigerating equipment, 355
Systems Designers Ltd
To join Insac Data Systems Ltd, 164

T

Tagis Investments Ltd
Merger not referred to MMC, 66
Tandown Products
Develop wheeled rake, 124
Tanzania
Where the tide is on the turn: market report, (LA) 87
Tate and Lyle Refineries Ltd
Price Commission investigation, 212
Taxation
(*see also* Inland Revenue; Value added tax)
Double taxation: convention signed with Ghana, 640; convention signed with Irish Republic, 640; death duties discussion resumed with Sweden, 444; protocol signed with Austria, 444; talks with the Netherlands, 640; talks with Tunisia, 335
Taylor, E. S.
Appointed UK representative of the Malta Development Corporation, 26
Taylor, Gordon Rattray
A Salute to British Genius, (BN) 172
Technical Development Capital Ltd
Technological innovation competition awards, 70
Technical help to exporters
see British Standards Institution
Technical Marking Systems Ltd
Develop non-clogging aerosol ink, 324
Technology
(*see also* Marine technology)
Changes in the Population of Persons with Qualifications in Engineering Technology and Science 1959 to 1976: report, 161
Government expenditure, (PQ) 429, (PQ) 432
Metal spraying repair success, 21
Telcan Containers Ltd
Occupy advance factory at Pontardulais, 70
Telecommunications
(*see also* Post Office)
Compact ferrite-rod VHF aerial developed, 266
Exhibitions and fairs: Atlanta, 235
Export services, 402
Interim Report of the National Committee on Computer Networks, 160
Small telephone answering machine developed, 173
Telephones
see Post Office; Telecommunications
Textile machinery
Exhibitions and fairs: Algiers, 238
Textile Machinery Industry Scheme: end of scheme, 317; grants approved, (PQ) 553
Textiles
(*see also* Cotton; Floorcoverings; Hosiery; Knitwear; Man-made fibres; Wool textiles)
Textiles—*continued*
Double-jersey fabrics with laid-in fancy yarns developed, 126
Dumping allegations, (PQ) 392
Exhibitions and fairs: Frankfurt, 229, 506
Government aid to textile industry, (PQ) 390
Hong Kong: imports, (PQ) 430, (PQ) 554; quota usage of textile exports, (PQ) 636
Import regulations *see* Import regulations, EEC
Mill closures in Huddersfield area, (PQ) 392
New bilateral arrangements should give better protection to UK textile industry, 331
Structural Problems of the Textile and Clothing Industry, (BN) 386
Wholesale textile houses: nos of sales (ST): 1977, Aug, 154; Sept, 520
Thackray (Charles F.) Ltd
Develop low temperature steriliser, 20
Thailand
Cosmetics regulations: colourings, 242
Food regulations: beverages, 35; coffee, 514, 651; colourings, 98; tea, 514
Import duties: oil products, 284; precious, semi-precious and imitation jewellery, 241
Import fees: aluminium foil, 197; laboratory glassware, 98; menthol, 138; viscose rayon fibre, 98
Import licensing: wood and wood conversions, 35
UK/Thailand agreement to restore air services signed, 212
Thames
Pilotage in the Thames, (PQ) 434
Thorelli, Hans B.
Consumer Information Systems and Consumer Policy, (BN) 628
Thorelli, Sarah V.
Consumer Information Systems and Consumer Policy, (BN) 628
Timber
Government assistance: aid given, (PQ) 554
Tobago
see Trinidad and Tobago
Tools
see Hand tools; Machine tools
Tourist trade
(*see also* Hotels)
British Tourist Authority: *the London Visitors Survey, 1977,* 627; members and salaries, (PQ) 553; members appointed, 116; tourism promotion Apr-Sept 1977, (PQ) 553
Business travel, (LA) 557
Coping with increased tourist traffic from US, (Sp) 448
English Tourist Board: members and salaries, (PQ) 553; tourism promotion Apr-Sept 1977, (PQ) 553
Foreign visitor arrivals, (ST): 1977, July-Aug, 521
Government finance incentives, (PQ) 327
Merseyside, (PQ) 429
Overseas travel and tourism, (ST): 1977, 2nd qtr, 247, (*correction*) 304
Overseas visitors 1977, (PQ) 391
Pattern of tourism and foreign travel, (ST): 1976, 596
Seaside and spa resorts need to define their present role, (Sp) 319
Selective tourism projects, (PQ) 429
Tourism development projects, (PQ) 495
Tourist boards' budget, (PQ) 429
Toys
Dangerous toys, (PQ) 634
Exhibitions and fairs: Singapore, 444; Tokyo, 190
Trade, Department of
see Department of Trade
Trade descriptions
see Consumer protection
Trade Promotions Services Ltd
Export missions: North America, 336
Trades Union Council
Steel committee meets ministers to discuss BSC problems, 418
Trading practices
Unsolicited goods: law relating to, (PQ) 633; solicitations looking like invoices, (PQ) 632
Trafalgar House Ltd
Merger not referred to MMC, 627
Transline Ltd
Develop mobile wages office, 265
Transmark Ltd
see British Rail
Transport
(*see also* Air Transport; British Rail; Rail transport; Road transport; Shipping)
Course on freight forwarding for newcomers, 24
Export services, 30, 31, 134, 647
1978-79 transport supplementary grant announced, 624
Trading with Europe: a report by the Economic Development Committee for International Freight Movement, (LA) 438
Transport equipment: terms of trade index movement, (PQ) 492
Transport Users' Consultative Committees
East Midlands: chairman reappointed, 485
London: chairman appointed, 320
North West: members appointed, 69
Role, (PQ) 392
Scotland: members appointed, 384
Transport and Road Research Laboratory
Develop safety chest pad for motor-cyclists, 74
Transport Users' Consultative Committees
see Transport
Travel
see Tourist trade

Treasury, HM
Trends in real incomes, (ST) 105
VAT Treasury orders 1977, 333
TRF Pland Ltd
Merger not referred to MMC, 544
Tribology
Course on gas bearings at Risley, 76
Trinidad and Tobago
Import ban on horses, 138
Import regulations: invoices, 284
Labelling regulations, 590
Triton Engineering Co (Sales) Ltd
Develop vibrating screen separator, 548
TUC
see Trades Union Council
Tungsten
see Metals
Tunisia
Double taxation talks, 335
EEC/Tunisia trade agreement on olive oil, 334
Import duties: aluminium pellets, 355
Turkey
EEC/Turkey trade agreement on olive oil, 334
Import deposits, 242
Road transport agreement with UK, 242
Turner, H. A.
Management Characteristics and Labour Conflict: a Study of Managerial Organisation Attitudes and Industrial Relations, (BN) 18
Tyneside Investment Trust Ltd
Merger not referred to MMC, 384

U

UDI Group Ltd
Develop precise underwater survey system, 323
UG Glass Containers Ltd
Price Commission: allows interim price increase, 161; investigation, 118
UK Tariff and Overseas Trade Classification
see Export trade procedure
UNCTAD
see United Nations Conference on Trade and Development
Unemployment
see Employment
UNIDO
see United Nations Industrial Development Organisation
Union of Soviet Socialist Republics
EEC fishing rights lapse, 77
Gas minister, Mr Orudzhev, visits UK, 181
Latex foam agreement with Dunlop, 65
London C of C trade conference, 448
Soviet delegation visits UK, 183
UK/USSR talks on shipping issues, 112, (PQ) 327, (PQ) 328, (PQ) 329, (PQ) 497
Unit pricing
see Prices; Weights and measures
Unit trusts
Authorised unit trust scheme: amendments to list, 70, 262, 545
United Arab Emirates
Abu Dhabi
Exhibitions and fairs: export services, 508
Hotel accommodation 5 Nov-25 Dec, 280
Dubai: food labelling, 96
Petroleum and the Economy of the United Arab Emirates, (BN) 547
Visa regulations, 590
United Glass Ltd
Merger referred to MMC, 66, 260
United Kingdom Atomic Energy Authority
Chairman appointed, 168
Develops: infra-red thickness monitor, 630; smoke detector tester, 174
Organises seminar on major chemical hazards, 75
Physico-Chemical Measurement Unit develops nuclear magnetic resonance spectrometer, 267
United Kingdom Chemical Information Service
Launches chemical business news service, 22
United Kingdom Guarantee Corp Ltd
Merger not referred to MMC, 425
United Nations
Economic Commission for Europe: *Bulletin of Statistics on World Trade in Engineering Products, 1975*, (BN) 172
Seminar in Bulgaria on electro-mechanical handling equipment in engineering industries, 573
United Nations Conference on Trade and Development
Common fund: establishment, (PQ) 223; suspension of discussions, 569; UK policy, (PQ) 497; UK position, paper published, 257
Integrated programme for commodities; state of progress, (PQ) 222
United Nations Industrial Development Organisation
Discussions on industrial projects in South America, 84
Information Sources in the Cement and Concrete Industry, (BN) 18
United States
Consumer Product Safety Commission *see* US – Safety regulations
Economic indicators of the industrial countries, (ST): 41, 244, 461
United States—*continued*
Energy conservation: clothes washers, 138; refrigerators, freezers and driers, 98
Environmental Protection Agency: motor vehicle engine's emission standards, 98
Food and drug regulations: cosmetic colours, 590; food contaminants, 138; gelatin, 459; intraocular lenses, 459; medical devices, 98, 138, 514; plastic beverage containers, 98; saccharin and salts, 459; sodium thiosulfate as a food ingredient, 35
Import duties: generalised system of preferences, 284, 355; steel nuts, bolts and screws, 651; wool cloth, (PQ) 223
Import regulations: speciality steels under quota, 35, 98, 138, 197, 242, 284, 355, 406, 514, 590; tariff quotas, 590
International Trade Commission
Reports: casual and sport headwear, 98; fresh cut flowers, 98; headwear, 35; pipe and tube fittings, 284; special steel quotas, 355
Labelling regulations: cosmetic ingredients, 35, 355
Restrictive trade practices or boycotts: proposed amendments, 35
Revised commodity control list, 514
Safety regulations: architectural glazing materials, 138; baby rattles, 514; children's sleepwear flammability, 355; flammable fabrics, 651; records of consumer product safety complaints, 406; substantial product hazards, 35
Securities and Exchange Commission: disclosure of corporate debt, 590
Surface mail strike, 268
Tax Reform Act 1976: temporary changes, 336
Visit by Alex Eadie, 180
Unitrition International Ltd
Develop plant to make animal feed from waste, 388
University of Leicester
Spacelab telescope study, 22
Unsolicited goods
see Trading practices
Upholstery
see Furniture
Upper Volta
Hints to Businessmen, revised edition, 335
USSR
see Union of Soviet Socialist Republics

V

Valley Canoe Products Ltd
Develop electroplated diamond router, 22
Value added tax
EEC ministers agree assessment of VAT for own resources, 113
Partial exemption rules, 627
VAT News 13, 487
VAT: Special Schemes for Retailers: revised notice, 320
VAT Treasury orders 1977, 333
Valves
see Hydraulics
Van Heusen
Effect of Export Year on the company, 335
Varley, Eric, Secretary of State for Industry
Addresses Institution of Works Managers, (Sp) 380
Visits: Birmingham, 112; British Steel Corporation at Port Talbot, 162
VAT
see Value added tax
Vauxhall Motors Ltd
Develop remedial car for young children, 269
Vegetables
see Food
Venezuela
Import duties: barbed wire and small metallic stands, 590; potatoes and garlic, 651; tariff changes, 514
Import licensing: clinical thermometers, 406
Import restrictions re-imposed on processed meat and vinegar, 284
Ventilation
see Heating and ventilation
Vickers Ltd
Develop computerised equipment to analyse blood samples, 388
Vickers Medical Ltd
Develop medical isolator system, 491
Vietnam
Mail services to Vietnam, 336
Visits overseas by businessmen
Business travel, (LA) 557
Export missions and tours: China, 182, 640; Gulf States, 86; Hong Kong, 182, 640; Iraq, 444; Japan, 161; Kenya and Tanzania, 269; Mauritius, 130; Mexico, 182; Middle East, 182, 640; New Zealand and Australia, 336; North America, 182, 336; Singapore, 182, 640; Singapore and Manila, 398; South Africa, 182, 640; South Korea, 337; United States and Canada, 348, 640
Volvo
People at Work, (BN) 72

W

Wadkin Ltd
Develop metric range of dowel drills, 324
Wages
see Pay
Wales
IDCs issued 1967-77, (PQ) 634
Index nos of industrial production, (ST): 1977, 2nd qtr, 156
Welsh Development Agency: advance factory programme, 69, 623; investment in John Williams of Cardiff Ltd's foundry operations, 542; investment mission to US, 623; invests in Deeside industrial park, 383; plans to divert river for industry site, 165
Walker (J. W.) and Sons Ltd
Develop use of solid state control systems in church organs, 267
Wallace, Helen
Policy-Making in the European Communities, (BN) 428
Wallace, William
Policy-Making in the European Communities, (BN) 428
Walters, David
Distribution Planning and Control: a corporate approach, (BN) 120
Warren Spring Laboratory
Mineral processing research and consultancy services, 12
Report on reclamation of mixed waste plastics, 175
Seminar on sampling systems for on-line process analysers, 630
Waste materials
Government's waste and recycling campaign, (PQ) 391
Iron and steel scrap *see* Iron and steel
Paper: utilisation in OECD countries, (PQ) 637
Report on the reclamation of mixed waste plastics, 175
Waste paper
see Waste materials
Water
National Water Council: EIB loan, 443
Watson (Robert) and Co (Constructional Engineers) Ltd
Complete structural steelwork bridge and entrance building at Gatwick Airport, 166
Weapons
see Military equipment
Weaver, Len
Employee Participation: current practice and future intentions, (BN) 72
Webb, Carole
Policy-Making in the European Communities, (BN) 428
Weights and measures
(*see also* Metrication)
Electronic temperature indicator developed, 19
Fees increased for examination of weighing or measuring equipment, 383
First constant potential x-ray thickness gauge developed, 267
Radiation contamination monitors developed, 21
Temperature controller for historic textile conservation developed, 74
Weights and Measures (Marking of Goods and Abbreviations of Units) (Amendment) Regulations 1977, (SI) 256
Welding
Exhibitions and fairs: Essen, 29, 133
Welding and Flame Cutting Using Compressed Gases: Health and Safety at Work Booklet, 326
Wellings, Sir Jack
Appointed member of NEB, 64
Welsh Development Agency
see Wales
West Indies Chronicle
Insight: new monthly bulletin on the Caribbean, 131
West of England Trust Ltd
Merger not referred to MMC, 384
Westinghouse
Statement by Department of Trade on RTZ Ltd v Westinghouse, 66
Wholesale prices
Changes in Price Commission index, retail price index and wholesale price index, (ST): 1977, Sept, 104; Oct, 362; Nov, 592
The economy – selected indicators: wholesale prices (*Published in all numbers*)
Index nos, (ST): 1977, Sept, 104, 147; Oct, 257, 294, 357; Nov, 482, 516, 606
Wholesale trade
Sales by textile houses, (ST): 1977, Aug, 154; Sept, 520
Wholesale trades in 1974: summary by VAT trade classification, (ST) 201
Wicksteed (Charles) and Co Ltd
Develop metal sawing machine, 489
Wigtown
Development area status, (PQ) 434
Wilks, Jim, Chief Executive of British Overseas Trade Board
Addresses Blaw Knox, (Sp) 335
Williams, Alan, Minister of State, Department of Industry
Addresses: British Institute of Management conference, (Sp) 418; International Machine Tool Exhibition (Zemo) in Hanover, (Sp) 23
Announces new small-unit factory programme, (Sp) 163
Opens: Coca-Cola plant at Milton Keynes, 211; seminar in Copenhagen to attract Danish investment to UK, 380
To address Yorkshire and Humberside industrial strategy conference, 164
Visits Merseyside, (PQ) 392
Welcomes Nordic Bank Survey of Scandinavian subsidiaries in the UK, 263

Williams (John) of Cardiff Ltd
Investment by Welsh Development Agency, 542
Wilson and Royston Ltd
Occupy advance factory at Brighouse, 542
Wilson Committee
see Committee to Review the Functioning of Financial Institutions
Winches
see Materials handling
Winter, Frank
Addresses seminar on export planning and research in Birmingham, (Sp) 23
Women
Women at Work: no 1, (BN) 72
Wood Bastow Holdings Ltd
Merger not referred to MMC, 384
Wool textiles
(*see also* Knitwear)
Government assistance to the industry, (PQ) 223
Output and exports, (ST): 1977, Aug, 364; Sept, 594
United States' high tariffs, (PQ) 223
Woolf, J. M., Deputy Chairman of HM Customs and Excise
Woolf, J. M.—*continued*
Opens Business and Light Aviation Show at Cranfield, (Sp) 335
World Intellectual Property Organisation
see Patents – Patent Co-operation Treaty

Y

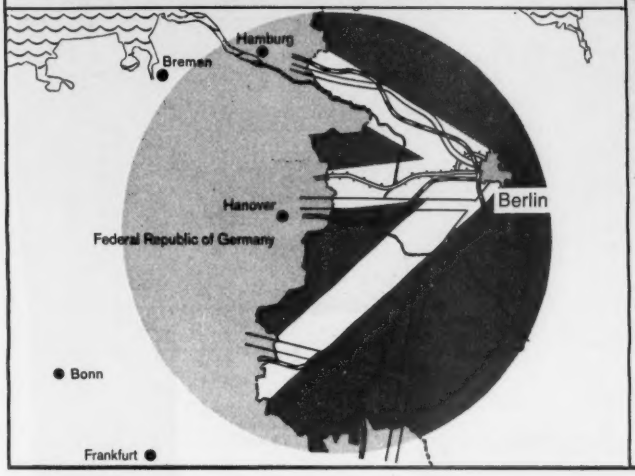
Yachts
see Boats
Yemen Arab Republic
Import regulations: soft drinks, 242
Normal business operating, 242
Yorkshire and Humberside
Assisted areas: December deadline for applications, 3,117
Employment in Yorkshire, (PQ) 390
Government assistance to industry, (PQ) 389
Grants to citizens' advice bureaux, (PQ) 633
Industrial strategy conference, 164
Yorkshire and Humberside —*continued*
Overseas investment in W Yorkshire, (PQ) 497
Yorkshire and Humberside Development Association
see Regional development
Yugoslavia
Belgrade: hotel accommodation scarce until February 1978, 182
Import duties: changes, 98; ships, 651
Import regulations: global foreign exchange quotas, 98
New legislation, 98
Regulations: plant protection substances, 651

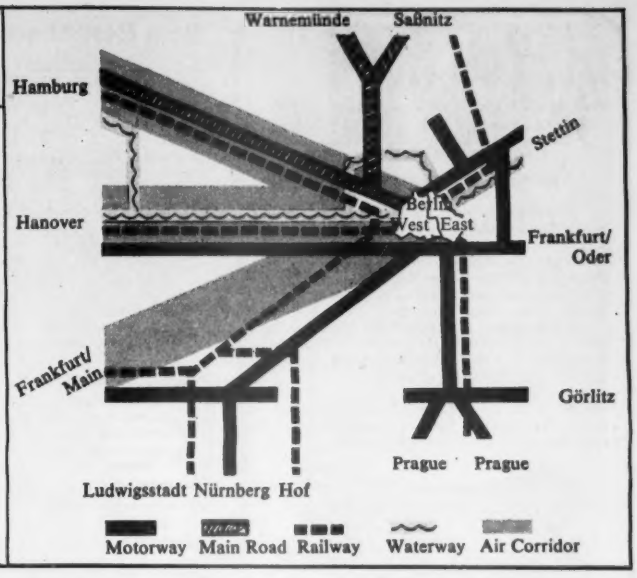
Z

Zahn, Wolfgang
Exporting to the Federal Republic of Germany, (BN) 488
Zambia
Industrial Development Act, 98

West Berlin's vital arteries

Communications by air, road, rail and waterway





perity – you can almost hear the cash registers as you walk down the Kurfürstendamm – and this impression is only reinforced by an excursion to the more straitened atmosphere on the other side of the wall. The population is slowly shrinking, it is true, and some 20 per cent of the city's 2 million inhabitants are over 65 years of age, but it remains the largest city in the federal republic and West Germany's largest single consumer market.

The city's department stores import a wide range of high-quality goods for their discriminating customers. Largest among them, with the highest turnover of all department stores in Germany, is the Kaufhaus des Westens (Ka De We). Ka De We's managing director visited Harrods some three years ago to study their methods of store organisation, particularly the 'shop within a shop' system, which has now been brought into use in Ka De We. Incidentally, Ka De We carries the largest selection of British goods to be found under one roof in the whole of Germany.

The appetite for consumer goods is enhanced by the heavy visitor traffic (around 4 million people a year). One of the major draws is West Berlin's role as a conference and exhibition venue. The city's reputation in this field has been built largely by the Berlin Congress Hall – nicknamed 'the pregnant oyster', thanks to its architect – which has been established on its Tiergarten site since 1957. Demand is so promising that the hall's existing capacity is beginning to prove insufficient and, in April next year, the huge new International Congress Centre Berlin (ICC Berlin), next door to the city's exhibition grounds on the Messedamm, will become operational, with its 80 congress and work-rooms including a 5000-seat auditorium. Combined with a full exhibitions diary (which includes the international agricultural 'green week'; Europe's largest radio and tv exhibition, and the annual international tourism exchange), the new facilities are expected to play a major part in boosting the number of visitors to West Berlin.

East-West centre

The growth of Berlin as a convention venue is linked to the city's increasing importance as a centre of east-west trade, particularly since the signing of the quadripartite agreement. This strategic commercial advantage is being fostered by two organisations – the Berliner Absatz – Organisation, which offers free advice on trading with eastern bloc countries, and the International East West Co-operation Centre, currently sponsored by a number of West German firms.

Officially the East German state buying agencies prefer to deal directly with overseas capitals – London, Paris etc – but the groundwork for these negotiations is often informal contact between East Berlin factories and agencies in West Berlin. Depending, of course, on what you produce, advice on the best way to sell to east bloc countries can be obtained from the Department of Trade in London (initially) who would contact on your behalf either the British consulate-general in West Berlin or the British embassy in the country concerned.

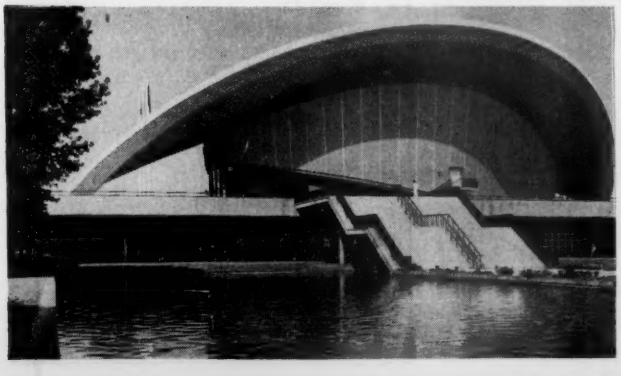
Trade between West Berlin and the GDR is still fairly slight. At the moment, by far the bulk of the city's deliveries (77 per cent) go to the federal republic – 20 per cent for direct or indirect shipment abroad – and only 3 per cent go to eastern Europe (including the GDR). The federal republic is equally dominant on the imports side, supplying about 82 per cent of West Berlin's needs, leaving 13 per cent to come directly from abroad, and only just over 4 per cent from the GDR.

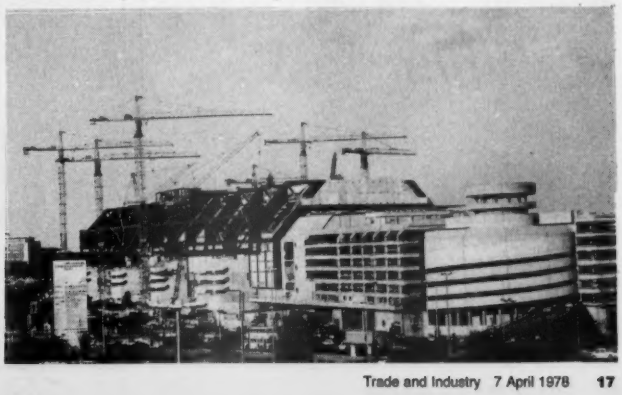
Whilst trade between the city and its 'parent' is given first priority, the Berlin Senat is encouraging efforts to capitalise on West Berlin's geographical position to cultivate trade with eastern Europe – especially with the GDR and Poland. And the signs are that this policy is beginning to bear fruit, if slowly.

Trade with the UK

Any analysis of Berlin's trade with other countries is complicated by the fact that almost all imports and exports go via the Federal Republic of Germany. Only direct exports and direct imports figure in the city's trade statistics. For example, department store chains with central buying offices in the federal

The conference venue: left, the 'pregnant oyster' and, right, the new International Congress Centre being built on the Messedamm.





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West Berlin: some facts and figures

1976	West Berlin (a)	FRG incl West Berlin (b)	(a) as % of (b)
Area			
Total area	480 sq km	248 620 sq km	.19
Area of agricultural value	1 700 ha	13 270 mil ha	.013
Population			
Total	1 967 000	61.442 mil	3.2
Economically active	853 000	25.076 mil	3.4
Industry	299 000	11.379 mil	2.6
Agriculture	3 600	1.714 mil	0.02
Services	550 400	11.983 mil	4.6
Foreign workers	83 000	1.921 mil	4.3
Foreign workers per '000 of economically active population	97	95	102.0
Productivity			
GNP in current prices	DM41 545 m	DM1 124.9 mrd	3.7
GNP adjusted (base year 1970)	29 187 m	789.1 mrd	3.7
Investment in plant and equipment (current prices)	6 510 m	91.4 mrd	0.7
Industrial production			
GNP in the manufacturing industries	DM20 187 m	DM544.6 mrd	3.7
Building industry	2 233 m	79.3 mrd	2.8
Wages and prices			
Gross monthly salaries (employees)	DM2 242	DM2 265	99
Weekly wages (workers)	431	438	98.4
Disposable income (annually)	30 772 m	979.3 mrd	3.1
Cost of living			
All households (Dec 1976)	143.5	140.8	101.9
Increase over the previous year	+ 5.1%	+ 4.5%	

Note: m = million Mrd = milliard (1 000 000 000)

republic clear all imports through customs in the city where their buying office is situated. Goods subsequently sent to Berlin are 'lost' in the combined figures for deliveries from the federal republic and do not appear in Berlin's import statistics as imports from, for instance, the UK. However, as far as UK exports are concerned, there is certainly room for improvement in almost all sectors.

It is probably fair to say that West Berlin's purchasing power, aided as we have seen by financial concessions, is generally underestimated in the UK. British consumer goods – carpets, porcelain, clothing and reproduction furniture – are in demand and selling well, but greater planning and investment, especially in advertising, could bring even better returns.

The commercial section of the consulate-general in West Berlin is ready and willing to help British businessmen take advantage of the opportunities by arranging introductions and providing specific market information. Advice from this source could be particularly valuable for the market newcomer.

But vice-consul (commercial) Harry Payne estimates that fewer than one-fifth of British business visitors to West Berlin bother to take advantage of the facilities his office can offer, pointing out that many visitors to Germany don't include Berlin in their itineraries. He urges those who do visit Berlin to inform him beforehand and to call in to see him or one of his staff while they are there. The same applies, of course, in all countries where there is official British commercial representation – the staff are there to help you, but they cannot help you if they don't know you are there.

There is an enormous potential for exports to West Berlin, especially in the consumer goods field, but as in most overseas markets these days, the business opportunities are more likely to be snapped up by the well-known visitor than by the stay-at-home, desk-bound scribe.

General view of the British stand at the twelfth international tourism exchange (ITB Berlin), held this year from 4 to 12 March.

More about the market

Firms interested in finding out more about the market in West Berlin or in the GDR should first contact their local regional office or the Department of Trade, Export House, 50 Ludgate Hill, London EC4M 7HU. Addresses of the British diplomatic posts in Berlin are as follows:

British Consulate-General,
Commercial Department,
1 – Berlin 12,
Uhlandstrasse 7/8,
tel. 309 52 95/97, telex 184 268 (a/b UK BLN D).

British Embassy,
Commercial Department,
108 Berlin,
Unter den Linden 32/34.
Postal address:
British Embassy,
East Berlin,
c/o BFPO 45,
tel. 220-2431, telex 113172 (a/b 11-3172 BEBERDD).

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TRI 3

Overseas trade exhibitions

Nearly a million visitors to French Agriculture Week

From Robert Hyde, British embassy, Paris

From 5 to 12 March the Semaine Internationale de l'Agriculture again occupied the entire exhibition park at the Porte de Versailles in Paris.

As in previous years, Agriculture Week comprised the Salon International de l'Agriculture (of which the Salon d'Aviculture formed a part), the Salon International de la Machine Agricole and the Salon International de la Motoculture de Plaisance-Jardinage.

This was again a great public event as well as a collection of specialised trade shows, and the attendance again approached the million mark, on this occasion falling short by only 23 000 and in the process registering an increase of more than 3 per cent over the 1977 figure in spite of the fact that the first round of the French legislative elections fell on the first day.

As it has done every year since 1970, the British Agricultural Export Council sponsored a joint venture in the livestock section of the agriculture show with the British Overseas Trade Board. The 26 exhibitors in the group on this occasion included a number of regular visitors, including the National Cattle Breeders Association and the National Sheep Association, whose joint stand featured the first appearance on the British stands of a Hereford bull contributed by the Hereford Herd Book Society. As in previous years, a number of Herefords were displayed separately by the French Hereford breeders association. Sussex and Friesian cattle were also on display, and the latter breed's representation in France received a boost which might be described as welcome but not unexpected with the birth of a calf on the penultimate day of the show. As in the previous two years, the excellent and convincing Whitbread portable pub was on hand to slake the thirst of exhibitors and visitors of all nationalities.

As usual, the food hall was particularly crowded throughout the show. All regions of the host country were represented, and in the international section the Highlands and Islands Development Board profited from the absence this year of the Meat and Livestock Commission to sail under the colours of Scotland. The steak bar serving excellent entrecôtes or lamb chops supplied by the Scotch Quality Beef and Lamb Association repeated the great success it had had in previous years, and among companies assembled on the HIDB stand, Dewar's were particularly successful with their Ancestor and White Label Scotch whiskies.

Britain was again very prominent at the forty-ninth agricultural machinery exhibition, which occupied four of the seven exhibition halls and a vast outside area. It hardly seemed possible that this show could continue to grow, but this year it was a case of looking in vain for any unfilled space in the exhibition park.

The Agricultural Engineers Association were again the sponsors of a British joint-venture at this salon, which this year featured 11 companies. Among regular exhibitors at this show were Wright Rain with its irrigation systems and Ruston's Engineering showing automated cattle feeding equipment. Newcomers to the group included W. J. Reynolds (Equipment), promoting its 'Hydroblitz' high-pressure industrial cleaning equipment, while N. J. Froment returned to the show after a break of two years with tractor-driven generators and moisture meters.

The Thursday of Agriculture Week is traditionally British Day. The British ambassador, Sir Nicholas Henderson, visited a number of British stands in the morning, and Edward Bishop, Minister of State at the Ministry of Agriculture, Fisheries and Food, paid his regular visit to these exhibitions.

This was another enormously successful Agriculture Week. The British contribution was well up to standard, and was another feather in the cap of the British Agricultural Export Council and the Agricultural Engineers Association.

Agricultural machinery exports

In the caption to the photograph on page 658 of the 24 March 1978 issue of *Trade and Industry* the figure for UK agricultural machinery exports to France in 1977 should have been £63 million. The figure for worldwide exports should have been £937 million.

Japanese market hungry for British food

From John MacDonald, British embassy, Tokyo

In view of the UK's track record in food and drink exports to Japan and the good potential for growth, it was disappointing that only nine exhibitors from Britain took part in the Hoteres and Foodex '78 show held in Tokyo from 13 to 17 March, on a stand organised jointly by the British Food Export Council and the British Overseas Trade Board.

Roger Avins of F. R. Benson and Partners commented: 'Our sales increase over the last two years is in no small way due to Hoteres and Foodex', and Michael Hackett of Lindisfarne Liqueur was pleased with his order for five containers of a new brand of whisky.

Other companies that took part were James Ashby and Sons Ltd, with its teas and preserves; Associated Biscuits and Chiltonian Ltd, both noted for biscuits; Elsenham Quality Foods with a range of marmalades, preserves, condiments, cakes, mints, jellies and sauces; Jackson of Piccadilly, displaying a range of teas; Merrydown Applewine, with heady brews of mead and country wines; and Smith Kendon, which has very successfully penetrated the market in depth with its sugar confectionery. All expressed satisfaction with the results of the show.

At just over 72 000, the total attendance in 1978 was down slightly from the 74 000 in 1977. This decline seems to have resulted from the fact that for most of the time this year only the one exhibition was taking place at the Harumi international trade fair ground, whereas two other exhibitions were held concurrently with Hoteres and Foodex '77.

The quality of the attendance was however high, with the vast majority from the food and drink trade in Japan. Philip Platten of the British Food Export Council commented that the show overall was very useful for contact with the wholesale and retail sectors, and that it gave good exposure to the market. 357 Japanese and foreign companies took part in this show, with a total of 15 national stands.

In 1977, the total value of processed food exports from Britain to Japan came to £56.3 million, or 12 per cent of the total of British exports to Japan. Of that figure, no less than £41.3 million was represented by alcoholic beverages (mainly Scotch whisky. British confectionery and biscuits, black tea, jams and marmalades are also well established in the local market. In a successful British food and drink promotion at a major department store in Tokyo last autumn, the sales targeted for 10 days were achieved in six.

The 1978 event can be termed successful. Hopefully, next year will see much stronger representation by British industry, leading to even greater impact in a market which is hungry for new products.

Need to raise UK-GDR trade to new levels

From Andrew Lance, British embassy, East Berlin

British industry and commerce were represented by over 160 firms at the Leipzig spring fair which took place from 12 to 19 March. Representatives and agents of many other UK firms also attended the fair to investigate market prospects in the German Democratic Republic (GDR) and to transact business with GDR and other eastern European foreign trade organisations. Altogether over 100 countries were represented at the fair.

The main displays at the fair covered the metallurgical industry, heavy machinery and plant, conveying and lifting equipment, machine tools, farm and food processing machinery and electrical engineering and electronics products.

The main British exhibits were two joint-ventures organised by the British Overseas Trade Board and the Birmingham chamber of commerce (comprising 14 firms) and the Scientific Instrument Manufacturers' Association (15 firms).

Outside the main exhibition ground, British firms were also well represented in specialist exhibitions of food, drinks and confectionery, toys and books.

It is probably too early to form a clear picture of how British exhibitors fared. The GDR

is not the kind of market where one can expect results overnight, but most newcomers were able to make useful initial contacts with the appropriate foreign-trade enterprises and some longer-established exhibitors were able to report worthwhile business.

Two firms, Solartron and Rowntree Mackintosh Ltd were awarded gold medals for their products. Some leading British firms used the fair to pursue negotiations on major contracts which it is hoped will come to fruition in the coming months.

For many exhibitors attendance at the fair was at least as important for the business they transacted with other eastern European countries as for business with the GDR itself. For them, Leipzig remains the most important meeting place for east-west trade.

On the opening day a high-level GDR government and party delegation visited the UK's information stand. The delegation was led by the Chairman of the Council of State and General Secretary of the socialist unity party, Erich Honecker, and included the Prime Minister, Willi Stoph and the Chairman of the People's Chamber, Horst Sindemann, as well as a number of ministers and senior officials, including the Minister of Foreign Trade, Herr Soelle. They were received by the British chargé d'affaires and introduced to senior representatives of British firms prominent in trade with the GDR.

Erich Honecker expressed the GDR's interest in broadening and deepening relations with Britain to both countries' mutual advantage, and emphasised the need to raise our trade relations to a new level.

The British chargé d'affaires later gave a reception for senior GDR trade representatives and leading British industrialists and exhibitors. Among those present were GDR State Secretary for Foreign Trade, Gerhard Beil, and the Deputy Minister, Dr Schwierz.

Loudspeakers boom at Paris hi-fi fair

From Robert Hyde, British embassy, Paris

The twentieth Festival International du Son held at the Palais des Congrès in Paris from 6 to 12 March attracted a record 300 exhibitors, of whom only 60 were from the host country. The exhibition was the largest ever, occupying an area of 25 000 m² to fill the exhibition halls.

Altogether, 33 British companies participated directly or through agents, 15 of them benefiting from financial support in the second joint venture at this event sponsored by the British Overseas Trade Board and the Federation of British Audio. Among the well known names represented were Rank, showing the Leak and Wharfedale speakers, and Celestion (Ditton) also very prominent, as befits its pre-eminent position in the French market.

Perhaps the outstanding exhibit from Britain was the advanced prototype Signifer loudspeaker system produced by Mordaunt-Short. The system attracted, deservedly, a great deal of interest and the hi-fi world seems likely to hear a great deal about it in the future.

This excellent international hi-fi exhibition more than confirmed its leading reputation, and it is to be hoped that British interest will be more than maintained in future years.

Carpet firms pile on pressure in Japan

From R. Lavery, British embassy, Tokyo

With over £150,000 worth of business concluded at the fourth British carpet exhibition held at the British Export Marketing Centre from 13 to 18 March, and prospective business from the event amounting to between £2¼ and £2½ million during the coming 12 months, the 18 participating companies have proved once again that persistence in the Japanese market has its rewards.

Seen in the context of major export markets for British carpeting, Japan is still small at under £2 million in 1977. Furthermore in 1977 the market for carpeting in Japan was depressed with local production stagnant and total imports 15 per cent down over the previous year. The British industry maintains, however, that Japan is a growing and worthwhile market.

Over the last five years the industry has put much hard effort and dedication into the market, and there are no signs that it is about to relax its grip. Indeed, even before the exhibition had closed, Geoffrey Davidson, secretary of the British Carpet Manufacturers Association, and his participating members were already planning the fifth exhibition in Tokyo (either in April or October 1979), and individual exhibitors had decided to return to Japan at least once before next April.

As at other exhibitions the full range of British carpeting and rugs was on display but the accent was placed this time on contract carpeting, a developing sector in Japan. With this slant in mind, Katsuhiko Shiraishi, president of the Japan interior designers' association, kindly agreed to act as guest of honour at the opening reception, hosted by the British ambassador Sir Michael Wilford. Both he and John Mackay, chairman and managing director of Hugh Mackay and Co Ltd, the British industry spokesman at the exhibition, were warmly received during and after the opening formalities.

Of the 18 companies taking part, none was new to the Japanese market. With one or two exceptions, who prefer to operate without a formal agency arrangement, all were represented by local companies.

Despite the overall downturn in the carpet trade last year, the interest shown by visitors to the exhibition gave most British participants and their agents confidence in the prospects for increased growth. Brian Dawson, group export director of Bowater Carpets, whose company and local distributors mounted successful nationwide special promotions towards the end of last year, was confident that his company was poised for real development in Japan. New ranges of carpet designed for the Japanese market would be introduced in September this year and their distributors, the Daiso Group, were giving thought to their own British promotion, possibly at the British Export Marketing Centre. Mr Lightowler, regional export manager of Kosset Carpets, said that his group, Carpets International (Northern) Ltd, which includes John Crossley, who were also exhibiting in Tokyo, also expected an upward trend in sales, principally in Axminsters but also in tufted prints.

Developing the market for imported tufted carpet, particularly printed, has not been easy, as Japanese buyers tend to still think of Britain as the home of Axminsters. Nonetheless companies such as Associated Weavers and Shaw Carpets return time and again to Japan to develop their tufted market. Mr Esplin, export manager of Shaw Carpets, firmly believed that there was vast business potential particularly for contract carpeting.

Acceptance of printing techniques is becoming more common in Japan as material costs grow, and provided British firms design for the Japanese market, the prospects for imported printed tufted seems certain to be encouraging. All exhibitors were clear on the need to develop special designs and colours for the local market, and respected the Japanese requirements for quality.

Ron Flight, export sales director of Thomson Shepherd Carpets, said that the exhibition had proved once again that there was still a discerning taste for top-quality wool Axminsters.

With perhaps no exception, all the participants will return to exhibit again in Japan. Richard Clegg, export manager of Hugh Mackay firmly believed that a British industry presence was required and that the British carpet companies owed it to their agents to exhibit regularly in Japan.

Geoffrey Davidson of BCMA believed that the exhibitions at the BEMC and individual company promotions were paying-off for his members. Of this exhibition he said that it had achieved its objectives of furthering the image of British carpets to the Japanese, by demonstrating the quality, design, advanced techniques and versatility of the British industry. Whereas 1977 had been a poor year for local and imported carpets in Japan, he was confident that 1978 would see growth in terms of volume and value for British manufacturers.

Encouragement in a dull footwear market

From H. von Massenbach, British consulate-general, Düsseldorf

Most of the record number of 585 exhibitors at the three-day, forty-fifth GDS – international footwear fair, which closed on 20 March in Düsseldorf, had found the pace rather slow going.

Although the attendance had been good, with over 24 000 trade visitors recorded, 25 per cent of which were foreign, the buying activity had been more than usually restrained. But most exhibitors had not come with high expectations as the footwear trade, particularly in Germany, was known to be going through a flat period.

The exhibiting firms, manufacturers and trading companies did however accept more readily than ever before that this trade fair's

Letters to the editor

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role is primarily to fill the need of the international footwear trade to familiarise itself with fashion and market trends and developments.

A regular feature of this international footwear fair is the exhibit of British footwear which, this time, was made up of 21 exhibitors of which 15 were manufacturers exhibiting under the British Overseas Trade Board joint-venture scheme with the British Footwear Manufacturers' Federation acting as sponsors.

Many of the regular exhibitors were indeed very satisfied by the quality of inquiries received and the value of orders booked at the fair. Others had not been quite so fortunate and were possibly more so victims of the general buying restraint and the widespread preference of the German trade in particular to fall back on existing suppliers.

The British exhibitors generally came away encouraged and most firms forecast a new record in export sales into the European footwear markets in 1978.

The forty-sixth GDS – international footwear fair Düsseldorf is due to take place from 23 to 25 September 1978.

Children's wear strikes right note at New York fair

From Keith Harris, British Trade Development Office, New York

With over 300 exhibitors and an estimated buyer attendance of 5000, New York's twelfth biannual European fashion fair, held at 1 Penn Plaza from 5 to 8 March, was the biggest ever.

For the first time British furs were on display. Eight firms in a joint venture sponsored by the Clothing Export Council and the British Overseas Trade Board included styles by top designers Bill Gibb, Ossie Clark, Katherine Hamnett and Caroline Eavis in a special fur section at the fair. Fur garments on display ranged from elegant mink and fox coats to young blouson jackets in such stunning designs as reversible gaberdine and dyed blue fox, Spanish lamb with knitted collar, cuffs, shoulder piece and welt and reversible leather and blue fox tabard.

In addition to this new group, the now familiar large contingent of British fashion-wear firms took part in the BOTB joint venture sponsored by the British Knitting Export Council; 47 firms participated, making this the largest ever joint venture at the European fashion fair, representing the best in British designer, knitted and children's wear.

Concern over the dollar was a major factor affecting buyers' attitudes. British firms suffered less than their German counterparts for example, but most buyers agreed that price would be a secondary consideration if they saw something they really wanted. British firms were particularly successful in children's wear. A number of joint-venture participants had brought over their children's lines to test the reaction and went away most satisfied with the results; the impact of children's wear at the show has persuaded the show organiser to introduce a separate children's-wear section at the next fair to be held from 17 to 20 September.

UK takes major orders at Yugoslav printing fair

From A. B. N. Morey, British consulate-general, Zagreb

'Intergrafika', the fourth international exhibition of the printing and paper industries, was staged in Zagreb from 14 to 18 March. As on each previous occasion, the participation of British manufacturers was highlighted in a joint venture between the British Overseas Trade Board and British companies, nine of which exhibited under the sponsorship of the London Chamber of Commerce and Industry.

Additionally, eight British manufacturers exhibited their products independently off their agents' stands.

Competition was keen between more than 250 exhibitors from 17 countries for orders from the growing Yugoslav printing and publishing industry. All the latest developments and techniques were on display with special interest being shown in the computerised photosetting systems of British, American and West German manufacture.

Each of the exhibitors in the British joint venture (which was the only officially sponsored collective grouping from any country at the exhibition) reported numerous inquiries and in some cases major confirmed orders. The only question mark still remaining when the event closed was whether, with the foreign-exchange allocation system in a state of a temporary flux, orders would be backed with the necessary hard currency.

The general manager of the Zagreb fair was, however, confident that prospective Yugoslav customers would get the foreign currency allocations they needed to buy up all the items which the British team had exhibited.

Freak weather hits attendance at Scandinavian fashion fair

From Margaret Maxwell, British embassy, Copenhagen

Scandinavians enjoy celebrating birthdays and anniversaries, so it was not surprising that the organisers of the Scandinavian fashion fairs at the Bella Center, Copenhagen, made special efforts to celebrate the 25th anniversary of the fair.

This was the largest women's-wear fair held in Copenhagen to date. Out of 788 firms, 564 were Scandinavian and there were foreign firms from 21 countries. All the Bella Center exhibition halls were filled, together with the Mart, where there are permanent show rooms for Scandinavian manufacturers, and a new hall (brought from the old Bella Center) housing young fashion and accessories.

Sixty British firms exhibited in the joint-venture area organised by the Clothing Export Council and the British Overseas Trade Board. The area looked very attractive with a pale cream carpet, large tubs of tulips and magnolias in the gangways and overhead signs with a floral motif proclaiming British fashion.

Apart from the manufacturers in the joint-venture there were 22 additional British firms exhibiting separately.

Many British clothing firms have been exhibiting regularly under joint-venture terms for several years in Copenhagen; among them are Lillygould, Alec Berman, Ladies Pride, Feminella, Ellis John Charles, Reggie and Miss Smith and Shubette. Their trade may and does fluctuate at each fair but despite this they have built up a steady business here and are part of the Scandinavian clothing scene.

There were eight newcomers this spring in the joint-venture, S. J. Fox, Clan Crest, Richess, A. Stafford and Co, Esta, Morvic, Debray and Wolkar. Some of them were pleased with their visit and plan to return.

Unfortunately, despite the flowery spring-like interior at the Bella Center, the weather outside suddenly deteriorated on the second afternoon of the fashion week. Snow storms do not normally disrupt traffic in Scandinavia, but there were freak conditions with the surfaces of wet roads suddenly freezing hard and turning into ice rinks. Taxis were nearly unobtainable and the Bella Center hired a fleet of buses to take exhibitors and buyers to the airport and to the centre of town.

The weather conditions undoubtedly affected the number of buyers attending the fair and the organisers' records show 16 107 visitors against 17 134 the previous year.

Since the Clothing Export Council and the British Overseas Trade Board first started exhibiting clothing in Denmark under joint-venture terms 10 years ago the exports of clothing from Britain to Denmark have reached a total of £31.7 million in 1977. This was an increase of 34.8 per cent on the 1976 figure and the industry confidently expects to put on a further increase in 1978.

As part of the anniversary celebrations, Queen Margrethe of Denmark visited the Bella Center, and the British joint-venture area.

Inger Staun (centre) buyer for Mester Dress of Copenhagen on the J. Nathan stand at the Scandinavian fashion fair.

Overseas trade export services

Jetsped service to open between UK and Belgium

Brantford International Ltd, the Barking-based subsidiary of the Furness Withy Group, will inaugurate on Monday 17 April its new Jetsped express road operation between London and Brussels.

Jetsped will operate between the Brantford terminal in London, and that of its Belgian associates, Edmond Depaire, at 94 Avenue de Port in Brussels, to provide a service with the speed of air cargo, but, the company says, at less than air cargo rates.

Initially, the service will be an afternoon departure from London on Monday, Wednesday, and Friday, with overnight transit, arriving at the Brussels depot the following day. The company intends to establish a daily service as soon as possible.

A regular service of comparable speed will be available in the reverse direction, which will be of interest to those companies in the UK currently importing from Belgium.

Efficient customs clearance facilities exist at the company-operated terminals in both London and Brussels to ensure final clearance and delivery without delay. A telecopier service is available where required to speed up customs procedures and each company operates comprehensive collection and distribution arrangements from their respective locations.

In some instances, the company claims, given a destination within reasonable reach of the terminal, delivery could be possible on the day of arrival at that terminal.

Users of the service will be issued with special Jetsped service labels.

Further information: circle 532

BMT offers Moscow travel package

Barry Martin Travel is setting up a series of six exclusive five-day tours to Moscow, inclusive of flights and accommodation, for only £302 per person.

Designed specifically to cater for the business traveller, these packages offer a full working week in Moscow with first-class accommodation for five nights and return flight to Moscow on scheduled services of British Airways for less than the normal air fare London/Moscow/London.

The six tours scheduled for 1978 depart on the following dates and return on the following Saturday: 17 April; 22 May; 5 June; 11 September; 30 October; 20 November.

The cost includes the following services: return economy-class air fare; accommodation in a first-class hotel in a single room with bath; transfer airport/hotel; the use of a chauffeur driven car for three hours per day, and BMT's visa service.

Further information: circle 533

Meadows Airfreight expands Middle East service

Meadows Airfreight Ltd has widened its UK-Middle East service further with the introduction of a twice-weekly consolidation service to Kuwait.

The service, complementing that available from sister company Meadows Air Charter Ltd (MACL) features direct flights from London (Heathrow).

The service has been introduced following the signing of an exclusive air-cargo, breakbulk-sales agreement between Meadows and Alsawan Company of Kuwait.

UK exporters using the new service will be offered both normal and deferred consolidation rates to cater for both urgent and less-urgent traffic at a cost-effective tariff.

Users of the service will have full regional and local access through Meadows' nationwide branch network. All branches are geared to handle bookings and local freight collections for final consolidation at the Colnbrook headquarters of Meadows Airfreight near London Airport.

Further information: circle 534

Langville packs a store

A contract for shipping all the equipment needed for a three-floor department store in Nigeria was completed in five weeks by Langville transport.

All interior fitting of the 6500 m² store was carried out by Eurolink Merchandising Systems Ltd.

Equipment was supplied by Eurolink from factories as far apart as Scotland and the south coast, and Eurolink placed a contract with Langville Transport Ltd for the collection and assembly of the equipment at Erith, packing for shipment, and forwarding to the destination port. In all, 129 cases were packed, with a total volume of 630 m³.

The Eurolink contract covered the entire equipment for the store, which ranged from checkouts and plastic carriers to cold rooms and refrigeration equipment, and from sales shelves and price tickets to clothing manikins and internal ceilings. Some of the equipment was delivered by manufacturers to the 23 000 m² Langville warehouses at Erith, but a great deal was collected by Langville Transport Ltd vehicles from various parts of the country.

For this collection and storage of equipment, as well as the subsequent packing, consolidation and shipping operations, Langville set up a complete documentation and control system – including even the printing of the documents – to ensure a logical, smooth and efficient sequence of events from manufacturers to ships. Loading into the ships was carried out at Baxter Fell Northfleet's own Tower Wharf at Northfleet, Gravesend.

Further information: circle 535

Langville Transport-packed crates for a Nigerian department store being loaded.

Freepost reader service

For further information on items in this section, circle the corresponding number on the reader services page near the end of the magazine.

Overseas trade country data

Australia

Files and rasps. A notice in *Trade and Industry*, 18 June 1976, reported a reference to the Industries Assistance Commission (IAC) on the question of the long-term assistance needs of the local industry manufacturing certain files and rasps. The Australian government has now considered the IAC report and recommendations and has decided to increase the long-term rate of duty on files and rasps, falling under CCCN 82.03.309, to 30 per cent applicable to both the general and preferential tariffs.

In addition, the government has decided to continue import licensing restrictions until 31 December 1978. The import licensing ceiling for files and rasps for 1978 will be 75 000 dozen, including round blunt chainsaw files which have now also been brought under licensing control.

Inquiries: OTAR 01-248 5757 ext. 468/469/401.

Special quota reserve for anomalies: textiles, clothing and footwear. The Australian government has announced arrangements for the continuation of the quota reserve for anomalies for textiles, clothing and footwear. The arrangements are in two parts:

1 a reserve for goods coming under quota for the first time from 1 November 1977 viz: knitted and woven curtains; certain knitted fabrics; certain rainwear garments; certain leather clothing; woven outergarment shirts; plastic pilches; thongs and parts for thongs; and sleeping bags; and

2 a further reserve for the six-month period beginning 1 July 1978 for footwear and brassieres and 1 September 1978 for textiles and the remaining clothing items.

For those goods covered in 1 above a reserve has been set aside. This reserve has been established at 15 per cent of the six months equivalent of the approved annual quota level.

For those goods covered in 2 above, the reserve set aside for the first period after the supplementary period will be the same quantity level as that provided for the supplementary period.

Furthermore, an anomalies reserve will be created for cotton sheeting and bed linen equal to 15 per cent of the six-months equivalent of the approved annual quota level. This will make the treatment of sheeting consistent with the rest of the textile industry.

Action will also be taken to make compensating reductions in reserves for knitted coats, jumpers, cardigans, etc, babies napkins and acrylic apparel yarns.

A notice in *Trade and Industry*, 24 March, refers.

Inquiries: OTAR 01-248 5757 ext. 468/469/401.

Commercial vehicles and components. The Australian government has asked the Industries Assistance Commission to inquire into and report by 15 May on the following: The level of assistance that should be accorded the production in Australia of:

1 general purpose vehicles and buses (other than vehicles having a gross vehicle mass rating of less than 2.72 tonnes) of a kind falling within tariff item 87.01.1 or 87.02.3;

2 components for use as original equipment in the production of vehicles referred to in 1;

3 prime movers for articulated dump trucks of a kind falling within tariff item 87.01.9.

In pursuing its inquiry the IAC has been requested to have regard to the government's desire to encourage local assembly of commercial vehicles and the consequent restoration of employment growth in the industry through:

1 reducing the duties payable on components for use as original equipment in the production of general-purpose motor vehicles and buses (other than vehicles having a gross vehicle mass rating of less than 2.72 tonnes) and on completely-knocked-down vehicles of these types;

2 the provision of assistance by way of bounty for the production of components for use as original equipment in the production of general-purpose vehicles and buses (other than vehicles having a gross vehicle mass rating of less than 2.72 tonnes);

3 setting the duty on assembled general-purpose vehicles and buses (other than vehicles having a gross vehicle mass rating of less than 2.72 tonnes) at a maximum of 22½ per cent.

The IAC has postponed the public hearing on light commercial vehicles and four-wheel drive vehicles which was scheduled for 20 March. It is now the intention to run both hearings together.

UK firms and trade associations intending to submit evidence at the public hearing, details of which will be announced later, should advise the IAC as soon as possible at PO Box 80, Canberra ACT2600. Evidence may be submitted either through the accredited agent of the firm or trade association concerned or through the Australian-British Trade Association, Dorland House, 18-20 Lower Regent Street, SW1Y 4PW, tel. 01-930 2524, which will represent UK firms' interests if authorised. The association charges a fee for its services, the amount varying according to the work entailed in the preparation of the submission and whether the interested party is a member.

Inquiries: CRE 01-215 8319.

Ref: CRE 1538/76, CRE 511/78

Bottle-washing machines. A notice in *Trade and Industry*, 6 January, reported a reference to the Industries Assistance Commission (IAC) on the question whether imports of bottle-washing machines into Australia and dutiable at the developing country preferential tariff were causing or threatening injury to the local industry.

The government has now announced that it has received the IAC's report and accepted its recommendations that such imports are not causing or threatening injury to the Australian industry. Accordingly the developing country preferential rate of 'Free' will remain unchanged.

Inquiries: CRE 01-215 5319.

Ref: CRE 1921/77

Bahrain

Import regulations-pharmaceuticals. The Ministry of Health has issued order 6/1977, which bans the importation of all pharmaceutical preparations containing hormones (stilbene derivatives, synthetic estrogens), with effect from 1 February 1978.

Copies of the ministerial order from OTAR 01-248 5757 ext. 475/420.

China

Trade marks. The British embassy in Peking has heard that the China Council for the Promotion of International Trade recently sent out a circular somewhat liberalising the procedure for registering a trade mark in China.

With effect from 1 January 1978, article 12 of the Ordinance Governing the Control of Trade Marks (which stipulates that foreign applicants should submit a certificate of registration from their own country) has been amended.

The new amendment allows for reciprocity, and as Chinese applicants to the UK do not require a certificate, UK applicants to China do not need to submit a certificate of UK registration.

Inquiries: Industrial Property and Copyright Department,tel. 01-405 8721 ext. 3243.

India

Budget 1978-79. The government of India announced its budget for 1978-79 on 28 February. It is modestly expansionary and entails

Further information

In many cases further information on the notices published on these pages is available to British exporters from the Department of Trade. The main branches concerned are: Commercial Relations and Export (CRE) Division, 1 Victoria Street, London SW1H 0ET (tel: direct dialling); and Overseas Tariffs and Regulations Section (OTAR), Export Data Branch, Export Services and Promotions Division, Export House, 50 Ludgate Hill, London EC4M 7HU (tel: 01-248 5757). In each case, the relevant information source is indicated at the end of the notice by its initials (OTAR or CRE) and, in the case of OTAR, the telephone extension.

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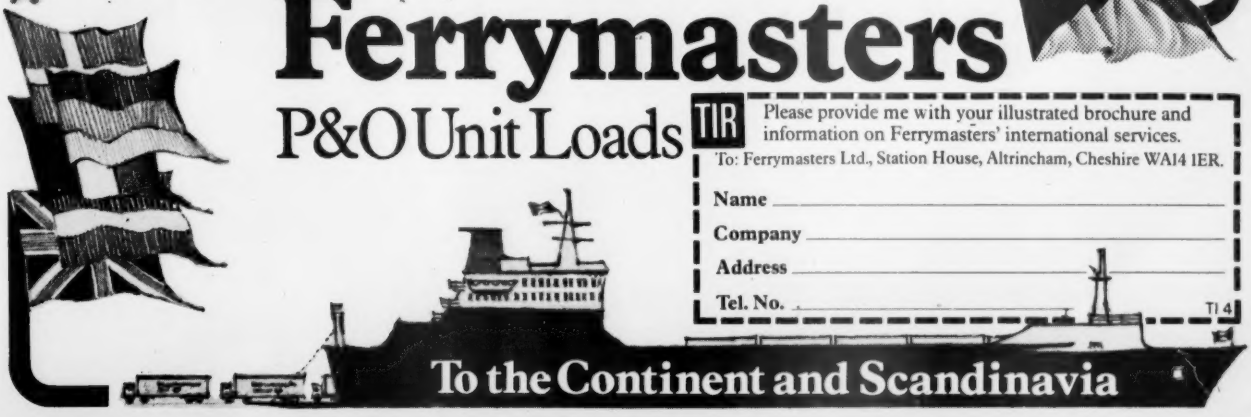

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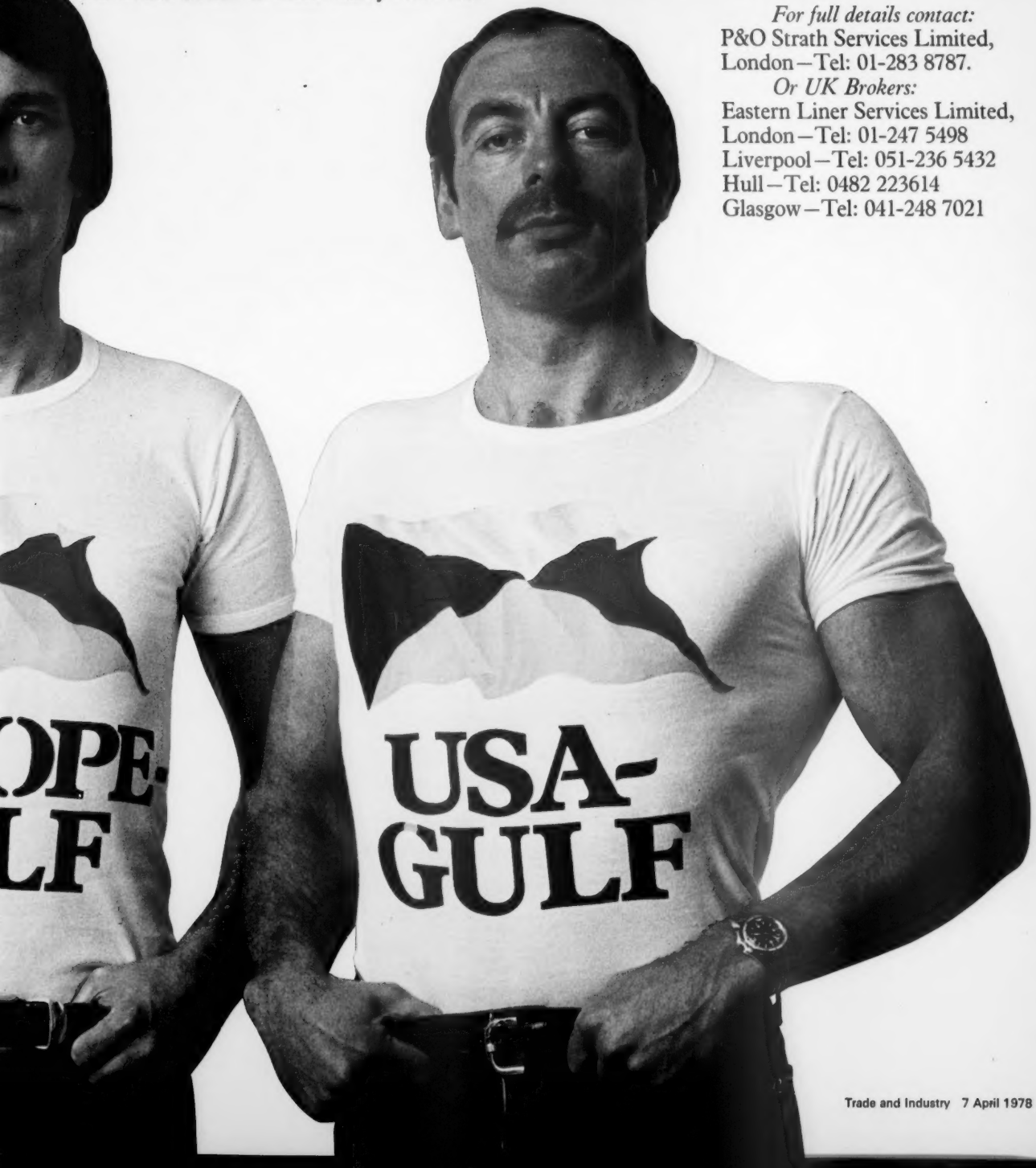
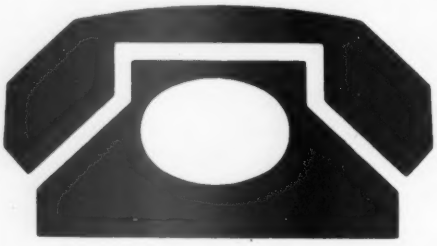


OTAR: help for exporters

Overseas Tariffs and Regulations Section (OTAR), Export Services and Promotions Division, Department of Trade, Export House, 50 Ludgate Hill, London EC4M 7HU (tel. 01-248 5757) can give you directly, or through your Regional Office, up-to-date information on the tariffs and customs regulations of overseas countries, import licensing regulations and restrictions including import quotas; certificate of origin; consular invoices and fees; labelling and marking requirements; foodstuffs, drugs and pharmaceuticals, agency legislation, setting up of a subsidiary company and the imports of samples. It also provides information, in collaboration with the Ministry of Agriculture, Fisheries and Food, on health regulations for livestock, meat, animal products and plants and seeds. In short, OTAR can help on almost all legislation which affects the entry of British goods into overseas countries.

Inquiries which concern the countries of more than one sub-section (excluding inquiries involving only EEC countries) should be made to OTAR's co-ordination sub-section on 01-248 5757 extension 452 or 454.

For information on specific countries, phone the number and extension given below



01-248 5757

extension

Sub-section A

1 Co-ordination of EEC regulations, requirements and common customs tariff (CCT), Denmark, France incl. overseas territories, Greece, Turkey, Cyprus

408 EEC legislation on tariff and non-tariff barriers relative to community trade

7174 EEC common agricultural policy – aspects affecting exports Denmark (incl. Faroe Islands and Greenland)

423 France and French overseas departments, French overseas territories, Comoros

439 Greece (incl. Dodecanese Islands), Turkey, Cyprus

2 Benelux, Dutch overseas territories, Irish Republic, Italy, Federal Republic of Germany

288 Belgium, Luxembourg, Netherlands, Netherlands Antilles, Aruba, Bonaire, Curacao St Eustatius, St Martin (Dutch), Saba, Surinam

466 Italy, Irish Republic

467 Federal Republic of Germany

Sub-section B

Efta countries, Spain, Gibraltar, Malta, Israel, Macao

458 Israel, Norway, Gibraltar, Malta

459 Austria, Sweden, Switzerland

460 Portugal, Finland, Iceland, Macao

461 Spain, Canary Islands, Andorra

Sub-section C

1 North America, Bahamas, Bermuda, West Indies

455 Canada

456 USA (incl. Alaska, Caroline Islands, Guam, Hawaii, Mariana Islands, Marshall Islands, Panama Canal Zone, Puerto Rico, Samoa (US), Virgin Islands (US), Wake Island)

7312 Anguilla, Antigua, Bahamas, Barbados, Belize, Bermuda, British Virgin Islands, Cayman Islands, Dominica, Grenada, Guyana, Jamaica, Montserrat, St Kitts/Nevis, St Lucia, St Vincent, Trinidad and Tobago, Turks and Caicos Islands

2 South and Central America

474 Argentina, British Antarctica Territories and Antarctica, Cuba, Dominican Republic, Falkland Islands, Haiti, Paraguay, Uruguay, Bolivia, Chile, Colombia, Ecuador, Peru. Venezuela

476 Brazil, Costa Rica, El Salvador, Guatemala, Honduras, Mexico, Nicaragua, Panama

Sub-section D

Africa

462 Algeria, Ceuta and Meilla, Egypt, Equatorial Guinea, Libya, Morocco, Sudan, Tunisia, Western Sahara

471 Angola, Cape Verde, Guinea Bissau, Jibuti (Djibouti), Malawi, Mauritius, Mozambique, Rwanda, St Helena and Tristan da Cunha and Ascension Islands, Sao Tome/Principe, Seychelles, Somalia, South Africa (with Botswana, Lesotho, SW Africa and Swaziland), Zambia, British Indian Ocean Territory

472 Benin, Burundi, Cameroon, Central African Empire, Chad, Congo (Brazzaville), Ethiopia, Gabon, Ghana, Guinea, Ivory Coast, Kenya, Madagascar, Mali, Mauritania, Niger, Senegal, Tanzania, Togo, Uganda, Upper Volta, Zaire

473 The Gambia, Liberia, Nigeria, Rhodesia, Sierra Leone

Sub-section E

Australasia and South East Asia, Eastern Bloc, China, Mongolia, Yugoslavia

401 New Zealand, Singapore, Thailand, W. Samoa, Chatham Islands, Cook Islands, Niue Islands, Tokelau Islands, Philippines

468 Australia, Solomon Islands, Cocos (Keeling) Islands, Christmas Islands (India Ocean), Nauru, New Hebrides, Papua New Guinea, Albania, Bulgaria, Czechoslovakia, German Democratic Republic, Hungary, Poland, Romania, USSR. China, Mongolia, Yugoslavia

469 Brunei, Fiji, Hong Kong, Indonesia, Malaysia, Tonga, Gilbert Islands (incl. Ocean Islands, Phoenix Islands, Line Islands), Tuvalu, Norfolk Island, Pitcairn Island

Sub-section F

Middle East (Part) and Asia (Part)

420 Afghanistan, Bangladesh, Burma, India, Nepal, Pakistan, Japan, Korea Democratic Peoples Republic, Korea Republic of, Sri Lanka, Taiwan, Yemen Arab Republic, Yemen Peoples Democratic Republic

475 Iraq, Jordan, Kampuchea (formerly Cambodia), Kuwait, Laos, Lebanon, Vietnam Socialist Republic of, Bahrain, Iran, Oman, Qatar, Saudi Arabia, Syria, United Arab Emirates

some change of emphasis in public expenditure towards the greater development of agriculture and small industry.

As a consequence of the budget's Finance Bill, the government has issued various customs notifications which reduce the import duty on some capital goods from 40 per cent to 25 per cent ad valorem. The concessions apply to certain garment and textile industry machinery, leather processing and finishing machinery, some miscellaneous machine tools and to some types of equipment used in oil exploration (CCCN chapters 84 and 85).

Also, as a protective measure, duty on imported polyester yarn is to be increased from 120 per cent to 200 per cent ad valorem.

It is also proposed under the budget provisions to impose a special excise levy on imported goods at the rate of one-twentieth of the basic excise rate applicable to any item.

No further details are available in respect of polyester yarn but copies of the customs notifications regarding the various machinery items are available from OTAR 01-248 5757 ext. 420/475/7062.

Libya

Import duty concessions. Following announcements concerning duty exemptions which may be claimed by certain Libyan manufacturers on machinery and plant and spares etc and primary materials the following additional industries are now included:

Aluminium window and door production
Glass fibre prefabricated articles production
Iron bed production
Iron forging and working
Marble cutting and polishing
Sardine packing

Inquiries: OTAR 01-248 5757 ext. 462.

Medical certificates. It has recently been announced that foreign nationals and their families entering Libya to take up residence for the first time are now required to produce the following medical certificates from medical establishments in the country of present residence with the exceptions of pregnant women and of children under ten years of age:

1 A physical fitness certificate following a general check-up, also specifying that the examinee is free from leprosy.
2 A certificate that the examinee is free of TB, supported by chest X-ray photograph.
3 A certificate that the examinee is free from syphilis, based on the Wassermann reaction in a blood test.
4 The result of stool and urine analysis.

These certificates must be endorsed by the Foreign and Commonwealth Office and afterwards legalised by the Libyan Embassy. They should then be presented to the Libyan Embassy with the passport when applying for a visa.

When a foreign resident of Libya wishes to renew his or her residence permit, the same series of certificates must be obtained from local medical sources.

Inquiries: CRE 01-215 5358.

CRE tel. Direct dialling

OTAR telephone 01-248 5757
Extensions to **OTAR** numbers are given at the end of each notice

Nigeria

Weights and measures. Further to the notice published in *Trade and Industry*, 17 March, schedule 8 of the Weights and Measures Decree 1974 operative from 1 April 1978 gives the standard metric quantities for certain prepacked consumer goods. The complete list incorporating various recent amendments is as follows:

Description of goods	Quantity, when packed in rigid primary containers of glass, plastic or metal	Quantity, when packed in containers other than those specified in the second column
1 Bacon and sausages	100 g, 200 g, 300 g, 400 g, 500 g, 1 kg, thereafter by steps of 1 kg	100 g, thereafter by steps of 25 g, to 250 g, thereafter by steps of 50 g to 500 g
2 Barley	—	100 g, 250 g, 500 g, 1 kg, thereafter by steps of 1 kg, to 50 kg, 80 kg
3 Beans and peas	—	250 g, 500 g, 1 kg, thereafter by steps of 1 kg to 10 kg, 90 kg
4 Beer	27 cl, 35 cl, 44 cl, 50 cl, 60 cl	—
5 Biscuits	100 g, thereafter by steps of 10 g, to 250 g, thereafter by steps of 25 g to 1 kg 175 g	100 g, thereafter by steps of 10 g, to 250 g, thereafter by steps of 25 g to 1 kg 175 g
6 Bread	—	225 g and multiples thereof
7 Butter	100 g, 200 g, 227 g, 300 g, 340 g, 500 g, 1 kg, thereafter by steps of 1 kg	100 g, 200 g, 227 g, 300 g, 340 g, 500 g, 1 kg, thereafter by steps of 1 kg
8 Cassava and yam flour	—	500 g, 1 kg, 2 kg, 3 kg, 4 kg, 5 kg, 60 kg
9 Cement	—	50 kg, 170 kg
10 Cocoa powder	100 g, thereafter by steps of 100 g up to 1 kg, thereafter by steps of 1 kg	100 g, 250 g, 500 g, 1 kg, thereafter by steps of 1 kg
11 Coffee, tea (other than tea in chests) chicory mixture	100 g, thereafter by steps of 5 g to 250 g, thereafter by steps of 10 g to 1 kg	100 g, 250 g, 500 g, 1 kg, thereafter by steps of 1 kg
12 Custard powder	100 g, 250 g, 300 g, 500 g, thereafter by steps of 250 g, up to 2 kg, thereafter by steps of 1 kg	100 g, 250 g, 500 g, 1 kg, thereafter by steps of 1 kg, 30 kg
13 Cream (edible)	100 ml, thereafter by steps of 100 ml to 1 litre include 110 g, 225 g, 170 g, 2 kg, 4 kg, 8 kg, 18 kg	100 ml, thereafter by steps of 100 ml, to 1 litre
14 Cream (cosmetics)	100 g, thereafter by steps of 25 g	—
15 Edible oil	100 ml, thereafter by steps of 100 ml, to 1 litre, thereafter by steps of 250 ml, to 5 litres thereafter by steps of 500 ml, 2 kg, 4 kg, 8 kg, 18 kg, 40 kg	100 ml, thereafter by steps of 100 ml, to 1 litre
16 Flour of oats, rice, beans, soya beans, rye, self raising flour	100 g, 250 g, 500 g, 1 kg, thereafter by steps of 1 kg	100 g, 250 g, 500 g, 1 kg
17 Food drinks (eg Ovaltine, Bournvita)	100 g, 225 g, 227 g, 450 g, 454 g, 900 g, 2 250 g	—
18 Liquid fuel	250 ml, 500 ml, 1 litre to 20 litres in steps of 1 litre, then by steps of 5 litres to 100 litres, thereafter by steps of 10 litres	—
19 Liquid fungicides and insecticides	250 ml, 500 ml, 1 litre, thereafter by steps of 1 litre	250 ml, 500 ml, 1 litre, thereafter by steps of 1 litre
20 Liquid polishes	100 ml then by steps of 5 ml to 200 ml then by 10 ml to 500 ml then by 25 ml to 1 litre	
21 Liquid soap, liquid detergent (not exceeding 5 litres)	100 ml then by steps of 100 ml to 1 litre thereafter by steps of 1 litre	100 ml then by steps of 100 ml to 1 litre, thereafter by steps of of 1 litre
22 Livestock feeds	—	50 kg
23 Lubricating oil excluding greases (exceeding 200 ml not exceeding 20 litres)	250 ml, 500 ml, 1 litre, thereafter by steps of 1 litre to 20 litres	250 ml, 500 ml
24 Maize flour	—	1 kg, thereafter by steps of 1 kg to 10 kg, 20 kg, 50 kg, 90 kg
25 Maize grain	—	1 kg, thereafter by steps of 1 kg to 10 kg, 20 kg, 50 kg, 90 kg
26 Maize bran	—	50 kg, thereafter by steps of 5 kg
27 Margarine, mixture of butter and margarine and tomato products	100 g, thereafter by steps of 25 g to 1 kg, thereafter by steps of 250 g to 5 kg	100 g, thereafter by steps of 25 g to 500 g, thereafter by steps of 50 g to 1 kg
28 Milk (not exceeding 5 litres) excluding evaporated or condensed milk	200 ml, thereafter by steps of 50 ml to 1 litre, except tinned milk in 100 ml, 200 ml, 300 ml, 400 ml, 500 ml	—
29 Milk powder including milk food and milk food substitutes for feeding infants	200 g, thereafter by steps of 50 g, to 2 kg, thereafter by steps of 100 g	100 g, 250 g, 500 g, 1 kg, thereafter by steps of 1 kg
30 Millet	–	80 kg
31 Paint and distemper	125 ml, 250 ml, 500 ml, 1 litre, 2 litres, 2½ litres, 4 litres, 5 litres, 20 litres, 25 litres, 500 g, 1 kg, 3 kg, 6 kg, 10 kg, 25 kg, 50 kg	500 g, 1 kg, 2½ kg, 25 kg, 5 litres
32 Rice	—	250 g, 400 g, 500 g, 750 g, 1 kg, 3 kg, 4 kg, 5 kg, 10 kg, 20 kg, 50 kg, 100 kg
33 Rice bran	—	50 kg, thereafter by steps of 5 kg
34 Rice paddy	—	75 kg
35 Salt	100 g, 250 g, 500 g, 1 kg, 2 kg	100 g, thereafter by steps of 10 g to 250 g, thereafter by steps of 25g to 500 g, to 1 kg, thereafter by steps of 250 g to 5 kg, 10 kg, 20 kg
36 Soaps (including detergent powder and scourer)	—	100 g, thereafter by steps of 10 g to 200 g, thereafter by steps of 25 g to 500 g, thereafter by steps of 50 g to 1 kg, thereafter by steps of 250 g to 5 kg, 10 kg
37 Soft drinks and mineral water	10 cl, thereafter by steps of 1 cl to 1 litre	—
38 Shoe polish	15 ml, 30 ml, 40 ml, 100 ml	—
39 Solid polish (other than shoe polish)	100 g then by steps of 5 g to 200 g, then by 10 g to 500 g, then by 25 g to 1 kg	—
40 Spices	100 g, 200 g, 300 g, 400 g, 500 g, 1 kg, thereafter by steps of 1 kg	100 g, 200 g, 300 g, 400 g, 500 g, 1 kg, thereafter by steps of 1 kg
41 Squashes	100 ml, thereafter by steps of 10 ml, 1 litre	–
42 Stout	30 cl, 60 cl	–
43 Sweets (sugar confectionery)	100 g, thereafter by steps of 10 g to 250 g, thereafter by steps of 1 kg	100 g, thereafter by steps of 10 g to 200 g, thereafter by steps of 25 g to 1 kg
44 Sugar	—	100 g, 250 g, 500 g, 1 kg, thereafter by steps of 1 kg to 10 kg, 100 kg
45 Sunflower seed	—	40 kg
46 Toilet paper	—	200, 225, 250, 275, 300 sheet per roll, 140 to 100 sq cm per sheet
47 Tomato products (see item 27)	—	—

Description of goods	Quantity, when packed in rigid primary containers of glass, plastic or metal	Quantity, when packed in containers other than those specified in the second column
48 Wheat flour and wheat grain	—	250 g, 500 g, 1 kg, thereafter by steps of 1 kg to 10 kg, 20 kg, 50 kg, 90 kg
49 Yeast	100 kg, 500 kg, 1 kg, 2.5 kg, 25 kg	—

Note: Packaged goods under 50 g need not be marked. Packaged products between 50 g and 100 g shall be lawful only if in quantities of whole number of grammes.

The following clarifications have also been received from the Nigerian Superintendent of Weights and Measures.

1 Definition of prepacked: Without prejudice to any interpretation which might be placed by the courts, the term 'Prepacked' means 'Made up in advance ready for retail sale, in a container or wrapper'.

2 Definition of consumer goods: Consumer goods are goods which, without further industrial processes, are ready for consumption by an ultimate consumer.

Exporters are reminded that the Weights and Measures Decree now applies to all sectors of the Nigerian economy, prepacked consumer goods being the last sector to be affected.

Inquiries: OTAR 01-248 5757 ext. 473.

Papua New Guinea

Budget. The Finance Minister, Barry Holloway, introduced the 1978 budget on 21 February. The minister explained that it had been prepared within the context of the four-year national public expenditure plan which was published on the same day. Planned expenditure for 1978 is Kina 485.8 million and expected receipts amount to Kina 476.2 million.

Features of the budget which may be of interest to UK exporters and investors are:

1 Duty increases on luxury imports (eg cars, electrical appliances).

2 Withholding tax on dividends paid to overseas shareholders by companies operating in Papua New Guinea will remain at 15 per cent; but all dividends whether paid overseas or in Papua New Guinea will be subject to this tax.

3 A simplified system of personal tax will be introduced and minor charges in personal allowances will be made.

4 Selective incentives to encourage investment mainly in companies manufacturing goods for export.

5 Government loan assistance to help new industries get established.

6 The government will also be prepared to pay up to 50 per cent of the cost of feasibility studies (subject to a maximum of Kina 100,000) for approved projects.

Inquiries CRE 01-215 5321.

Senegal

Embassy changes number. There is a new embassy telephone number for Dakar, Senegal. The number has been changed to 27051.

South Africa

Customs tariff changes. The following amendments were published in the South African *Government Gazette* of 10 March.

R.415 CCCN 37.01. The effect of this amendment is that: a The rate of duty on radiographic plates and film in the flat, sensitised, unexposed, is amended from 20 per cent or 190C per M2 (general) and free (MFN) to 20 per cent or 150C per M2 (general) and free (MFN); and b Fluorographic plates and film in the flat are excluded from subheading no. 37.01.10 with retrospective effect to 27 August 1976.

R.416 CCCN 59.04. The rate of duty on twine, cordage, ropes and cables, plaited or not, of polyethylene and polypropylene fibres or strip is amended.

R.417 CCCN 79.01. The effect of this amendment is that the rate of duty on unwrought zinc (excluding alloys thereof) is increased from free to 10 per cent.

R.418 CCCN 82.09 and 82.14. Tariff headings are restated and the rates of duty on certain goods are amended.

R.419 CCCN 96.01. The rate of duty on certain toilet brushes is increased.

Industrial rebates

R.420 Item 306.04. CCCN 29.14. Provision is made for a rebate of the full duty on iso-octanoic acid and isodecanoic acid for the manufacture of paint driers.

R.421 Item 316.01. CCCN 84.62. The effect of this amendment is that the provision for a rebate of duty on hardened iron or steel rings for the manufacture of bearings is withdrawn.

General rebates

R.422 Item 410.03. CCCN 30.03. Provision is made for a rebate of the full duty on stock remedies containing nitroxynil as active ingredient.

R.423 Item 460.04. CCCN 24.01. Provision is made for a rebate of the full duty on unmanufactured oriental tobacco in such quantities and at such times as the Secretary for Agricultural Economics and Marketing may allow by specific permit. The expiry date in respect of the existing provision for a rebate of duty on unmanufactured burley tobacco is deleted.

Inquiries: OTAR 01-248 5757 ext. 471/472/473/462.

Spain

Standardisation of cans of fish preserves and semi-preserves. The Spanish *State Gazette* of 8 March published order 6589 of 24 February amending annex I to the order of 30 July 1975 on the standardisation of capacities and dimensions of metal cans containing fish preserves. Copies of the table of changes in Spanish are available from OTAR 01-248 5757 ext. 461/458/459/460.

Suspension of import duty and reduction *in home compensation tax.* The Spanish *State Gazette* of 6 March, published Royal Decree 299/1978 of the Ministry of Commerce, suspending for three months from 6 March the payment of import duties on imported wines under CCCN 22.05 D 2 b.

On the same date the Spanish *State Gazette* published Royal Decree 298/1978 of the Ministry of Hacienda reducing the home compensation tax to be paid on red wines, under heading CCCN 22.05 D2 b to 5 per cent for a period of three months from 6 March.

Both the suspension and the reduction will be applied to a quota of 1 500 000 hectolitres of wine.

Inquiries: OTAR 01-248 5757 ext. 461/458/459/460.

CRE tel. Direct dialling
OTAR telephone 01-248 5757
Extensions to **OTAR** numbers are given at the end of each notice

Sri Lanka

Change of name. The president of Sri Lanka announced a change of name for the country on 3 March 1978. Formerly the Republic of Sri Lanka, it will now be known as the Democratic Socialist Republic of Sri Lanka.

Sweden

Product declaration system for chemicals. Late in 1977 the Swedish government authorised the Swedish Product Control Board to compile a central register of chemicals available in Sweden to include the following information: Names of all chemical products available in Sweden; their composition (to include CCCN nos.); application; manufacturers (to include all relevant company information, ie address, telephone number, company registration no., etc.); importer; quantities manufactured or imported; and details of changes of name.

Examples of products which must be registered include:

Petroleum products; inorganic substances; organic substances; fertilisers; colouring matters and paints; hair cosmetics; detergents, shoe-polish, car-polish, etc.; glue and adhesives; explosives; photographic chemicals; various chemical products (textile, paper and leather chemicals, disinfectants, metal mordent agents, petrol and lubricant additives, etc.); base plastics; masterbatch and raw rubber.

Where quantities manufactured or imported do not exceed 100 kg PA they are exempted from registration.

Registration is to be completed in stages:

Stage 1 was completed on 28 February, but was a local operation and required all Swedish manufacturers, importers (including manufacturers who imported chemicals direct for use in own processes) and agents to declare the chemicals manufactured or imported.

Stage 2 will begin in May when the Products Control Board will call one product group at a time for declarations of the composition, use and qualities of the products previously declared.

Later in the year the first declarations of the details of composite products will be called for (probably in the autumn). These declarations will normally be made by the local manufacturer, importer or agent, but it will also be possible for overseas manufacturers to submit product details direct to the Products Control Board.

English language information leaflets, instructions and forms for this purpose will be issued at the appropriate time and will be available direct from the Products Control Board, PO, S-171 20 Solna, Sweden. Registration is expected to take two to three years to complete.

Secrecy. The Products Control Board will protect the confidentiality of the product information declared to them Only where there is an over-riding public interest will the principle of confidentiality be breached (eg products hazardous to health). The computer-stored information will be subject to special security protection.

Inquiries should be addressed to Mr Day,

Chemicals and Textiles Division 3(c), Room 633, Ashdown House, 123 Victoria Street, London SW1E 6RB, tel. 01-212 6857.

Thailand

Special import fee on chemical fertilisers. The Thai Board of Investment has issued notice 5/2521 whereby a special fee of 20 per cent of the cif price is placed on the import of chemical fertilisers coming under tariff heading CCCN 31.05.

This applies specifically to chemical fertilisers containing nitrogen (N), phosphorus (P) in the form of useful phosphate (P_2O_5), and potassium (K) in the form of soluble potash (K_2O) in percentage of the net weight of chemical fertilisers of the following formulae:

	N	P	K
1	16	20	0
2	18	22	0
3	18	24	0
4	20	20	0
5	15	15	15
6	13	13	21

This however includes chemical fertilisers containing nitrogen or phosphorus food in the form of useful phosphate (P_2O_5) at not more or less than the above formulae not exceeding 6 per cent of weight of chemical fertilisers. Or chemical fertilisers containing potassium (K) in the form of potash (K_2O) which is soluble in water at not more or less than the above formulae not exceeding 6 per cent of the net weight of chemical fertilisers.

These new regulations will not apply to chemical fertilisers imported after the enforcement date of this notice, and which were loaded in the vehicles for export from the country of origin to Thailand prior to the 25 January 1978, or to which the Board of Investment has issued a letter certifying that the letter of credit was prior to 25 January.

The Board of Investment will determine which imports fall into this category and inform the Customs Dept. accordingly.

This notice came into effect on 10 February 1978 and remains in force until 24 January 1979.

Inquiries: OTAR 01-248 5757 ext. 401/468/469.

United States

Food ingredients. The *Federal Register*, 10 March, published a rule proposed by the Food and Drugs Administration to amend the standards of indentity for some cheeses, fruit jellies and preserves and to affirm potassium sorbate and sorbic acid as generally regarded as safe as food ingredients.

Written comments (4 copies) should be sent by 9 May to Food and Drug Administration, Room 4-65, 5600 Fishers Lane, Rockville MD 20557.

A copy of the text is available from OTAR 01-248 5757 ext. 456/457/7312.

Import of speciality steels under quota. Imports in pounds weight for the remaining product with quota still open as at 24 March 1978.

Plates of stainless steel (item 923.21) 4 953 504

Inquiries: CRE 01-215 5629.

Motor cycles. The *Federal Register*, 15 March, published a rule proposed by the Environmental Protection Agency to establish noise-emission regulations for new motor cycles and new replacement exhaust systems.

Written comments (5 copies) by 16 June 1978 to Motor Cycle Noise, AW 490, US Environmental Protection Agency, Washington DC 20460. Public hearings will be held.

A copy of the text is available from OTAR 01-248 5757 ext. 456/457/7312.

Architectural glazing materials. The *Federal Register*, dated 15 March, published a rule proposed by the Consumer Product Safety Commission to amend the safety standard for architectural glazing materials exempting leaded glass etc used for decorative purposes.

Written comments (5 copies) by 14 April 1978 to consumer Product Safety Commission, 1111 18th Street NW, Washington 20207.

A copy of the text is available from OTAR 01-248 5757 ext. 456/457/7312.

Boats. The *Federal Register* dated 6 March published a rule proposed by the Coast Guard to establish performance standards for flotation materials for monohull boats under 20 feet in length. Written comments by 23 April 1978 to Commandant (G-cmc/81) (CGD 77-145) L15 Coast Guard, Washington DC 20590. A copy of the text is available.

Inquiries: OTAR 01-243 5757 ext. 456/457/7312.

Motor vehicle bumpers. The *Federal Register* dated 6 March published details of a proposal by the National Highway Traffic Safety Administration to amend the regulation to permit simultaneous certification of compliance with the new motor vehicle bumper standard. Written comments (10 copies) by 20 April 1978 to National Highways Traffic Safety Administration, Room 5108, Nassif Building, 400 Seventh Street, SW, Washington DC 20590.

Inquiries: OTAR 01-243 5757 ext. 456/457.

Frozen cream type pies and gelatin. The *Federal Register*, 7 March, published a rule by the Food and Drug Administration to withdraw standards of microbiological quality for cream-type pies and for gelatin. This will provide future opportunity to establish consistent standards for these food products.

A copy of the text is available from OTAR 01-248 5757 ext.456/457/7312.

Lignite-fired steam generators. The *Federal Register*, 7 March, published a rule by the EPA to establish performance standards for new or modified lignite-fired steam generators with heat output greater than 73 MW.

A copy of the text is available from OTAR 01-248 5757 ext 456/457/7312.

Uruguay

Parcel service. An insured parcel service to Uruguay is now available, the maximum insurance limit being £250. Parcels may be insured for both the air and surface parcel service.

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Publicity for British exporters can often be obtained through use of the facilities of the Central Office of Information, which is concerned with collecting from industry items suitable for dissemination overseas by way of government information services. The COI is interested in news items, feature article material, photographs, tape recordings for radio, and films for television and other screening. Contact should be made with the nearest regional office covering your area.

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Telex 53277.

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Central Office of Information,
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New Station Street, Leeds LS1 4JG.
Tel. Leeds (0532) 38232 (after office hours 38330).
Telex Econplan 55472 Messages to be prefixed 'for COI'.

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Central Office of Information,
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European community news

Standing committee discusses work sharing

Community unemployment could best be dealt with by the creation of new jobs through active economic, employment and investment policies. General agreement was reached on this point during a discussion on work sharing by the EEC standing committee on employment which met in Brussels on 21 March. John Grant, Parliamentary Under Secretary of State for Employment, represented the UK.

The committee recognised, however, that in the present economic situation it would be unrealistic at least in the short-term to expect such policies to absorb existing levels of unemployment, and agreed that work-sharing measures had an important part to play in alleviating grave employment problems.

The committee emphasised the importance of overcoming the difficulties of both principle and implementation, especially regarding the costs involved, which would arise in developing work-sharing measures acceptable to employees, employers and government. During the discussion, the following possible forms of work sharing were mentioned: the reduction of working hours; the extension of annual holidays; restrictions on overtime working; the lowering of retirement age; the right to further education; restrictions on shift working; and back-up measures in the social security sector.

The committee did not consider it appropriate to make any specific recommendations at this stage between these various measures but agreed on the general aim of reducing the annual number of working hours per man. The committee felt, moreover, that if work-sharing measures were to have any effect on the employment situation, there should not be any overall increase in overtime worked. To make real progress, there should be close collaboration between governments and both sides of industry to arrive at the most widely-acceptable measures of achieving this aim both at national and community levels. But the committee said that the autonomy of the social partners, especially about collective bargaining processes, should be respected and regional as well as national considerations should be taken into account.

The committee said the commission had a major role to play in advancing new ideas and proposals and in facilitating the exchange of experience between member states.

Regular reports on progress at national level should be made by member states to the commission.

The committee concluded that discussions should continue at community level over the coming months in preparation for the next tripartite conference. This conference will discuss work sharing in the context of its overall strategy for the recovery of economic development and the return to full employment.

Further discussions on work sharing should be held, the committee said, in a more restricted context and the commission should be asked to take the initiative of convening all parties concerned with a view to continuing the committee's work.

The committee asked that its conclusions should be brought to the European council's attention when it meets on 7 and 8 April.

The standing committee had before it a commission document which suggested that discussions should be held on the possibility of a community initiative for the reduction of working hours. The commission also suggested that studies be carried out on the influence of social security on work sharing, temporary work and part-time work.

The commission stressed that a community initiative was desirable, if not essential, to maintain the community's competitiveness and also to preserve the overall coherent development of the community.

The following criteria, the commission said, should be applied:

1 account should be taken of the costs involved in putting into action any work-sharing measures and of the need for sharing the costs equally among the parties concerned;
2 back-up measures should be developed to enable undertakings and the economy to make the necessary adjustments;
3 work-sharing methods should be diversified in line with the situation in the country, sector or category of workers concerned; and
4 provision should be made for reserving certain work-sharing measures in the light of employment trends.

More community news

Information on European community matters and about member states can often be found in other sections of *Trade and Industry*. For this week's additional news, turn to the following pages:

Home news
Drivers' hours 6

New publications
Guide to foreign language courses and dictionaries 7

Overseas trade news
Market report: West Berlin 16

Exhibitions
French agriculture week 20
Paris hi-fi fair 21
Düsseldorf footwear fair 21

Export services
Jetspeed service between UK and Belgium 23

Statistics
Economic indicators of industrial countries 33
UK Euro-currency borrowing 37
UK textile exports 42
Registrations of community films 45

Silkin to fight for CAP reform and milk marketing boards

Common agriculture policy prices affect the UK's economy in three important ways, said John Silkin, Minister of Agriculture, Fisheries and Food, on 21 March.

Opening a debate in the House of Commons on a number of EEC commission agriculture documents, he said that they governed the price of most of the food which the UK consumer bought, and thus influenced counter-inflation policies and living standards; they affected the general cost of running the CAP, to which the UK paid a major share through its budgetary contribution; and they affected the cost of many of Britain's imports which in turn affected the balance of payments and trading relations with other countries. All these effects taken together could make a substantial difference to the UK's economic performance, Mr Silkin said.

Mr Silkin then referred to the publication of a summary of the latest study by the Cambridge Economic Policy Group. He said that the study drew a number of conclusions but there were three that he would emphasise. 'First, the direct cost of the CAP to the UK balance of payments is estimated to be currently about £1,000 million per annum and will probably rise to £1,200 million at 1978 prices by 1980. Second, food prices here are higher than they would have been if we were not applying the CAP. Third, to the extent that our economic expansion is constrained by the balance of payments, the real cost to our national income and output could certainly be much larger than the direct cost,' Mr Silkin said.

The precise level of the figures, Mr Silkin said, was open to argument. For example, they depended critically on the levels of commodity prices outside the EEC. 'I have no doubt that there can be much argument about the extent to which a balance of payments saving could generate further growth within the British economy. And I believe that the calculation of a 12 per cent increase in retail food prices as a result of the CAP may be somewhat on the high side. But, given present community and world price levels, when I consider the cost of the CAP I think Mr Wynne Godley and his team have got it pretty well right. The figures involved may seem to be large but there is in fact nothing new in this assessment. Indeed, as the study says, after making allowance for inflation the overall cost is very close to what was forecast in the 1970 white paper on the UK and the European communities.'

There were a number of important lessons to draw from this confirmation of the size of the economic burden which the CAP represents, Mr Silkin continued.

The study showed how right the govern-

ment had been to make its central aim for the reform of the CAP, the reduction of community agricultural prices in real terms. The study also showed that two-thirds of the cost to the UK arises from the money paid to the community budget. 'If we can get the cost of the CAP under control – and this means basically eliminating the structural surpluses – we can make a big reduction in our own net payment. We cannot, therefore, afford to relax our determination to prevent unjustified increases and this year, as last year and previously, my intention is to use our full negotiating strength within the council of ministers towards this end,' he said.

Mr Silkin said that the study showed that far from being a net receiver of benefits the UK was transferring resources on a large scale to the other member states of the EEC. 'In these circumstances I feel no inhibitions whatever about our benefiting from MCA subidies on our food imports. I feel no regrets about having negotiated the special butter subsidy last year. And I am in no doubt that the policy I have been following on the green pound is the right one in the national interest.'

Earlier, Mr Silkin had referred to the commission's proposal for a legal framework for the continuation of the UK milk marketing boards.

Mr Silkin said the boards had provided the UK with a valuable instrument which has allowed Britain to preserve the system of doorstep deliveries which was desirable both on economic and social grounds.

While other countries in the nine had witnessed a drop in the consumption of liquid milk over the last 12 years – Germany by 36 per cent, the Netherlands by almost 50 per cent, Denmark by 40 per cent, for example – the UK's orderly and vigorous milk market had continued. The fall in UK consumption over the same period was only 2 per cent.

Mr Silkin said that the loss of the daily delivery round would, as all continental experience showed, lead to a marked drop in consumption and, therefore, to increased sales into intervention of butter and skimmed milk powder.

'I have therefore been at great pains to get these points across to the commission and I was glad to be able, broadly, to welcome their proposals when they were published before Christmas. Nevertheless there are difficulties in the proposal for us.

'The requirement that 50 per cent of production be consumed in liquid form is restrictive; we need to protect Northern Ireland, which has its own problems; too many producer-retailers would be allowed to opt out of the scheme; and the five-year polls of producers militates against long-term planning.

'But, at least the proposals offer an opportunity for a secure basis for the boards within the framework of community legislation.'

In conclusion, Mr Silkin said, 'we shall fight for a settlement which attacks the structural surpluses at their roots and we shall fight to preserve those national institutions like the milk marketing boards, which are suited to our national needs and have proved themselves over the years.'

EEC seeks misleading advertising measures

A proposed EEC directive on misleading and unfair advertising which has gone forward from the commission to the council of ministers seeks community-wide protection of consumers, persons carrying on a trade, business or profession, and the interests of the public in general against unfair and misleading advertising.

The directive sets out criteria which would have to be taken into account in determining whether advertising is misleading or unfair – such as: the characteristics and conditions of supply of the goods or services; the nature, attributes and rights of the advertiser; whether it is entirely or partially false taking into consideration its total effect; whether it casts discredit on another person; appeals to sentiments of fear; promotes social or racial discrimination, or exploits the trust of the consumer.

Measures which would have to be adopted are detailed but the choice of remedies would be left to each member state provided that they satisfied certain basic requirements.

Those affected by misleading or unfair advertising would have a right to institute legal proceedings and this right would be extended to associations with a legitimate interest in the matter.

The continued existence of self-regulatory bodies would be permitted but would not be allowed to preclude persons or associations pursuing grievances through the courts.

Imports of Canadian kraft liner

The EEC commission has been carrying out investigations into the imports of kraft liner from various countries including Canada. Results of the majority of investigations were given in *Trade and Industry* 17 March page 608.

The commission has announced (*Official Journal*, C69, 18 March) that in the course of these investigations Canadian exporters concerned have given undertakings that have satisfied the commission that the introduction of protective measures is unnecessary at present. The procedure is accordingly terminated.

Summer time in the EEC

All members of the community, except Germany and Denmark, are applying summer time this year but the periods have not yet been aligned. For 1978 they are as follows:

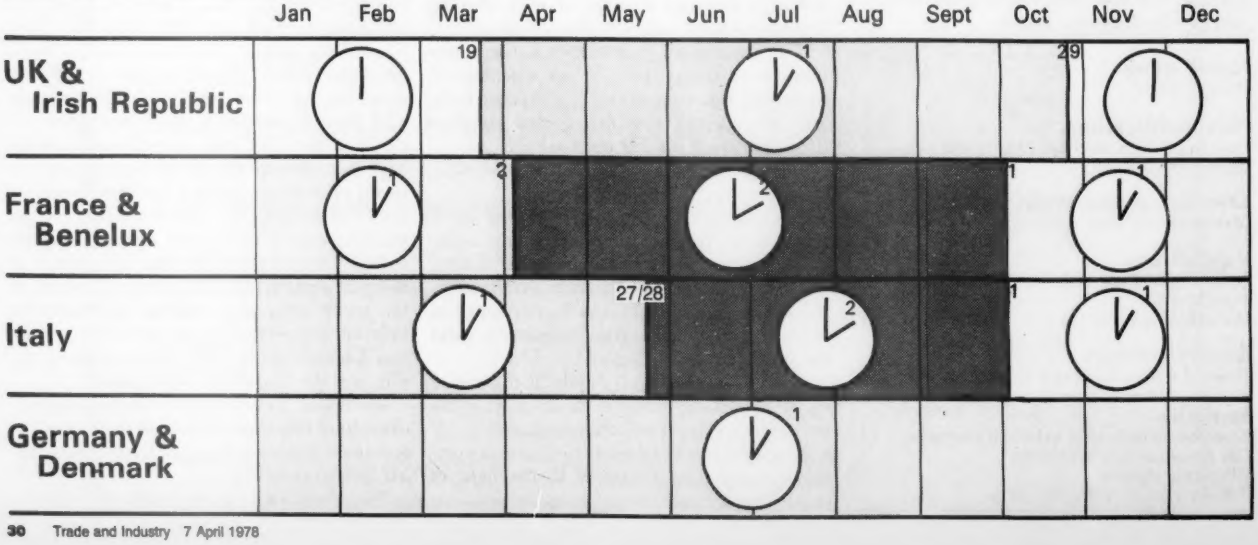
UK and Irish Republic 19 March (2 am) to 29 October (3 am)

France and Benelux 2 April (1 am) to 1 October (2 am)

Italy 27-28 May (midnight) to 1 October (1 am)

Whereas the UK and Irish Republic adopt Greenwich mean time (GMT) in winter and GMT + 1 in summer, the rest of the community works to GMT + 1 (Central European Time) in winter and, except Germany and Denmark, GMT + 2 in summer.

The European commission aims to synchronise the change to and from summer time to overcome the problems created by non-alignment. A draft directive to the council is under consideration by the UK government and other member states.



Japan proposes expansionary measures in talks with EEC

Japan's Minister of State for External Economic Affairs, Nobuhiko Ushiba, expects his country's current account surplus with the EEC to decline in the 1978 financial year. He thought that this trend would be seen by the autumn of 1978. The minister stated that the Japanese government estimated the overall current account surplus in the 1978 financial year to be about one-third smaller than in 1977.

This was stated in a communique issued after talks in Tokyo from 22 to 24 March on economic relations between the community and Japan between European commission vice-president Wilhelm Haferkamp and the Japanese minister.

Mr Ushiba stated that Japan's real growth target for the 1978 financial year was 7 per cent through the expansion of domestic demand and based on the assumption of a stable monetary situation. It was the intention of the Japanese government to take all reasonable and appropriate measures to achieve this target. It was noted that the official discount rate had been reduced by the Bank of Japan to 3.5 per cent as from 16 March.

Although the fluctuations of the foreign exhange market were seriously affecting the Japanese economy, Mr Ushiba stated that, taking into account the above estimate, the Japanese government would maximise its effort to reduce the overall current account surplus, as far as possible through the expansion of domestic demand and a series of new measures for improving the access of foreign goods to the Japanese market.

Mr Haferkamp had stressed the importance of Japan increasing the share of manufactured goods in its imports and Mr Ushiba said that the government would continue to take all appropriate steps to increase imports of manufactures and expected that the total volume of imports of manufactures would increase substantially. The minister also expected that the share of these imports in Japan's total imports, which had been distorted since the sharp rise in oil prices, would increase steadily and return within a reasonable period of years to a more normal level under current international economic circumstances.

Both sides agreed that reviews of the position might also be undertaken as required and it was agreed that the first such assessment would be held in June 1978.

In the talks both sides had stressed the importance they attached to strengthening the relationship between Japan and the community and to developing a common approach to world economic problems and to that end co-operating closely both bilaterally and in multilateral fora.

The communique states that both sides agreed that further progress in the international adjustments of balance of payments would be desirable for the harmonious development of trade and monetary relations, and that the accumulation of large current account surpluses was not appropriate in the present economic situation.

Both sides confirmed therefore their common recognition that greater stability in the international monetary situation was essential. Within this framework both sides agreed to pursue policies aimed at achieving lasting non-inflationary economic growth.

Mr Haferkamp drew attention to the substantial progress made in the community's member states in reducing inflation rates and deficits on current accounts. He said further progress could be foreseen in 1978. Mr Haferkamp further stated that the narrowing of disparities between member states had enlarged the scope for pursuing non-inflationary and sustained economic growth. He said that the EEC as a whole aimed at 4 to 4.5 per cent real economic growth target in 1978.

On general trade matters the communique says that both sides stressed the importance of maintaining the open trading system and countering protectionist tendencies. They re-affirmed the importance they attached to the success of the Multilateral Trade Negotiations and to meeting a target of an outline of the final package in July.

Japan and the community agreed to achieve results as substantial as possible in all areas of the MTNs on the basis of overall reciprocity. On tariffs, both sides agreed to make as much effort as possible to reduce, on a reciprocal basis, tariffs on items of interest to each other in the course of the negotiations.

On safeguards, while taking note of the respective positions on the problem of selective application, both sides agreed to negotiate actively, in full co-ordination with other participants, for the formulation of a mutually satisfactory international agreement on safeguards within the framework of Gatt.

Mr Haferkamp stated that the success of the MTNs depended, in particular both on a genuinely reciprocal reduction of tariffs and on progress towards the formulation of an international agreement within the framework of Gatt on the possibility of selective application, of safeguard action subject to due international supervision and through the application of article XIX.

Mr Ushiba said that Japan continued to attach great importance to the principle of non-discrimination and it would seek the removal of discriminatory measures. He said the Japanese government had announced its intention of initiating a sweeping review of its existing foreign exchange control system and a study of a new system based on the principle that all transactions should be free unless specifically prohibited.

The communique says that pending the introduction of the new system the Japanese government announced on 26 January an 11-point programme of measures for liberalising and simplifying exchange controls. Of these measures, the relaxation of the standard method of settlement for imports was implemented from 1 March and other measures were scheduled to be implemented from 1 April.

In the communique, Mr Haferkamp welcomed the fact that Japan had, on more than one occasion, introduced autonomous tariff cuts to contribute to further expansion of imports into Japan and it was agreed that when the MTN package was settled, the possibility of introducing advance tariff cuts would be considered in the light of industrial and trading situations.

Both sides agreed that, to promote community exports to Japan, it was important that community exporters should take full advantage of the market opportunities provided and to help such efforts both sides agreed to continue their co-operation in examining problems encountered by community exporters to Japan.

The communique says that purchasing missions to the community and sales missions from the community would be welcome.

Further efforts would be continued by both sides to improve import testing systems on a reciprocal basis. The communique outlines some measures taken by the Japanese government in response to community requests: the simplification of type approval system for imported automobiles; the acceptance of an important part of pre-clinical test data on drugs prepared abroad; an easing of the import testing procedures on diesel engines for marine equipment. Other problems would be discussed in continuing consultations.

On government procurement, Mr Ushiba said that Japan would use tender procedures to an increasing extent and by improving information would increase the opportunities for foreign suppliers.

On trade marks Mr Ushiba stated that community interests would be advanced by continuing consultations as well as by amendments to the Japanese trademark law which come into effect from June and by making improvements to so far as is possible in the administration of the law which would reflect representations from community interests.

On food and agricultural exports from the community, the communique say both sides recognised that some progress had been made and that co-operation would be continued.

The concluding section of the communique deals with aid and Mr Haferkamp expressed the hope that the Japanese government would increase its official development assistance (ODA) substantially and rapidly, in particular its multilateral aid and further promote general untying of its aid.

Referring to ODA, Mr Ushiba re-affirmed Japan's intention – as declared at the ministerial meeting of the conference on industrial and economic co-operation in June 1977 – to more than double its aid in five years and he stated that the Japanese government would make every effort to come closer to the average performance of other developed industrial countries. The minister noted that as part of such efforts, the proposed ODA for the 1978 financial year had substantially increased, and the type of ODA had improved through an increase in grant aid, and he stated that Japan would in future vigorously pursue such efforts. Mr Ushiba added that the Japanese government would pursue its basic policy of generally untying its financial assistance by substantially increasing untied ODA loans, including quick-disbursing programme assistance.

Mr Haferkamp welcomed these developments and stated that EEC member countries would continue to make every effort to increase effectively and substantially their ODA and to maintain its high quality.

Statistics

The economy: selected indicators

Series are seasonally adjusted except where shown otherwise

	Gross domestic product (average estimate)	Consumers' expenditure	Fixed capital expenditure			Changes in stocks				Balance of payments		
				of which			of which					
			Total	Manufacturing industry	Distributive and service industries excl. shipping	Total	Manufacturing industry	Wholesalers	Retailers	Current balance	Visible balance	Invisible balance
	at 1970 prices		at 1970 prices			at 1970 prices				at current prices		
Base of index Series in Stock level at end-1976	1970	£ million	£ million			18,401	£ million 10,528	1,830	1,929	£ million		
1971	101.8	32 675	9 682	1 988	1 922	92	−148	52	18	1 057	279	778
1972	104.2	34 542	9 797	1 721	2 035	34	−145	48	15	107	−701	808
1973	110.4	36 062	10 253	1 730	2 377	1,321	597	102	379	−910	−2 354	1 444
1974	109.5	35 361	10 287	1 964	2 300	596	634	81	−109	−3 538	−5 195	1 657
1975	107.2	35 269	9 640	1 695	1 921	−842	−429	−111	−65	−1 614	−3 205	1 591
1976	109.7	35 408	9 444	1 633	1 900	97	5	23	9	−1 107	−3 510	2 403
1977	110.6 p	35 143	9 040	1 761	2 072		219	103	17	−35	−1 612	1 577
1976 1st qtr.	109.0	8 808	2 377	397	448	−1	0	26	33	−47	−543	496
2nd qtr.	109.4	8 791	2 346	400	468	−12	−66	−20	−45	−345	−909	564
3rd qtr.	109.4	8 880	2 378	414	488	5	−2	14	16	−377	−1 097	720
4th qtr.	111.1	8 929	2 343	422	496	105	73	3	5	−338	−961	623
1977 1st qtr.	110.3	8 757	2 259	418	502	234	125	51	102	−505	−947	442
2nd qtr.	110.8	8 640	2 291	433	508	229	164	39	−5	−364	−764	400
3rd qtr.	110.5	8 825	2 263	456	530	−25	−31	5	−44	483	54	429
4th qtr.	110.6 p	8 921 p	2 227 p	455	533		−40	7	−36	351	45	306
% change last 2 qtrs. on prev. 2 qtrs.	—	+2.0	−1·3	+7.1	+5.2							
on a year earlier	+0.3	−0.4	−4.9	+9.0	+8.0							

	Industrial production		Personal expenditure		Prices and earnings					Labour (UK)			Visible trade (volume)	
	Total all industries	Total manufacturing industries	Retail sales	Cars: new registrations	Retail prices		Wholesale prices: all manufacturing industry		Average gross earnings of all employees (GB, all industries and services covered)	Unemployed excluding school leavers and adult students		Unfilled vacancies for adults	Export	Import
				monthly averages		% increase on a year earlier	basic materials and fuel used	manufactured products: home sales		mid-month count	% of total employees	mid-month count	On a balance of payments basis	
	at 1970 prices		at 1971 prices		(not seasonally adjusted)				(old series)				at 1975 prices	
Base of index £m in base year Series in	1970	1970	1971 16,296	thousands	Jan. 1974		1970	1970	Jan. 1970	thousands		thousands	1975 19,462	1975 22,667
1971	100.1	99.4	100.0	108.5	80.0	9.4	104.6	109.0	119.4	775.8	3.4	130.9	84.6	83.3
1972	102.3	102.0	105.3	138.6	85.7	7.1	109.2	114.8	134.8	854.9	3.7	147.3	84.5	92.4
1973	110.1	110.5	110.3	137.1	93.5	9.1	144.5	123.2	152.6	611.0	2.6	307.0	96.8	105.6
1974	106.3	108.9	109.0	102.8	108.5	16.0	215.3	152.0	179.6	599.7[1]	2.6[1]	302.7[1]	103.9	107.9
1975	100.6	102.2	106.7	97.2	134.8	24.2	235.4	188.7	227.6	929.0	3.9	150.0[1]	100.0	100.0
1976	101.4	103.1	106.5	104.7	157.1	16.5	299.0	219.6	263.3	1 269.8[1]	5.4[1]	120.4[1]	109.9	105.5
1977	102.4	103.6	103.6	107.1	182.0	15.8	340.1 p	261.7 p	288.5	1 378.1	5.8	155.6[1]	118.9	107.0
1977 1st qtr.	103.2	105.2	103.3	104	174.1	16.5	341.5	248.0	280.2	1 329.5	5.6	..	115.7	109.1
2nd qtr.	101.9	103.0	102.5	103	181.9	17.4	347.7	259.2	285.2	1 340.6	5.6	157.7	118.0	109.8
3rd qtr.	102.7	103.7	104.3	112	184.7	16.5	340.5	267.7	288.4	1 414.6	5.9	151.9	124.1	106.4
4th qtr.	101.7	102.6	104.4	110	187.4	13.1	330.6 p	272.1 p	300.3 p	1 427.8	6.0	160.1	117.9	102.6
1978 1st qtr.										1 409.4	5.9	187.7		
1977 Apr.	102.2	103.5	102.3	106	180.3	17.5	349.7	255.4	283.1	1 333.8	5.6	155.5	116.2	105.3
May	103.3	104.8	103.2	108	181.7	17.1	348.3	259.8	286.2	1 323.8	5.5	159.4	116.0	109.6
June	100.3	100.6	102.1	95	183.6	17.7	345.2	262.4	286.2	1 364.3	5.7	158.1	121.9	114.5
July	102.8	104.2	104.8	113	183.8	17.6	344.5	265.8	286.5	1 398.5	5.9	155.2	123.1	110.4
Aug.	102.8	103.4	104.7	116	184.7	16.5	338.8	268.1	288.7	1 410.3	5.9	153.4	123.4	101.3
Sept.	102.6	103.5	103.5	107	185.7	15.6	338.1	269.2	290.1	1 434.9	6.0	147.2	125.9	107.5
Oct.	101.5	102.4	102.7	116	186.5	14.1	333.8	271.0	294.6	1 431.5	6.0	156.0	119.4	101.3
Nov.	101.4	101.9	103.1	108	187.4	13.0	329.9	272.0	300.1	1 429.6	6.0	159.4	115.3	98.4
Dec.	102.3	103.4	106.9	104	188.4	12.1	328.0	273.3	306.6	1 422.3	6.0	165.0	118.9	108.1
1978 Jan.	102.9 p	103.0 p	104.9	125	189.5	9.9	324.9 p	277.0 p	306.0 p	1 419.2	5.9	180.3	112.6	114.4
Feb.			106.8	120	190.6	9.5	323.3 p	279.2 p		1 409.0	5.9	187.0	128.7 p	110.6 p
Mar.										1 400.0 p	5.9	195.8 p		
% change latest 3 months on prev. 3 months	−0.1	−0.3	+3.1	+5.4	+1.6		−2.6	+2.1	+4.5	−1.3			—	+8¼
on a year earlier	−0.9	−1.8	+1.6	+9.4	+10.5		−3.1	+13.6	+10.3	+6.0			+4¼	+2¼

p Provisional pe Preliminary estimate e Estimate .. Not available [1] Average of available months

Inquiries: 01-215 3453

Economic indicators of the industrial countries

The tables have been prepared for the convenience of users who do not have access to the sources themselves. International publications (as indicated) have been used, supplemented, where available, by later reports, denoted – e. The form of presentation adopted – indicators by subject – is for convenience only, and it must not be assumed that the indicators in the same table for different countries are strictly comparable. An attempt has been made to indicate major differences of definition, but the coverage and methods of collection vary considerably; this is partly due to different administrative procedures in various countries. Fuller details may be obtained from the sources indicated, and from the national publications of the countries concerned. Exchange rates are those used in the basic data sources. The group of industrial countries is taken as comprising the members of the Organisation for Economic Co-operation and Development (OECD), ie western Europe, north America, Japan, Australia and New Zealand. Consumer prices apart, New Zealand is excluded from OECD totals in that insufficient information is available.

The five tables in this article are published monthly. A full set of tables with commentary appears quarterly (see 2 December 1977).

Inquiries: 01-215 3442.

Table 1 **Industrial production** (excluding construction) seasonally adjusted

Indices 1970 = 100

	Belgium	Luxembourg	France	F.R. of Germany	Ireland	Italy	Netherlands	United Kingdom r	EEC[1]	Canada	United States	Japan	OECD
Weights in total	1.3	0.1	7.1	12.5	0.2	4.5	1.5	6.3	33.5	3.5	43.2	11.6	
1971	103	98.7	104	101.8	104	99.9	106	99.8	102	105.6	102.0	102.3	101
1972	109	102.8	112	105.7	109	104.4	111	102.1	106	113.0	111.0	110.2	108
1973	116	115.1	120	112.9	120	114.5	119	110.5	115	123.5	120.4	127.4	119
1974	120	119.1	123	111.3	122	119.0	125	108.5	115	127.4	119.9	123.5	120
1975	109	93.0	114	105.0	114	108.5	119	103.1	108	121.3	109.3	110.4	110
1976	118	98.9	124	112.7	125	121.1	126	104.3	115	127.4	120.4	125.4	120
1977	118	99.4	126	116.0		121.4	127	105.7	118	131.6	127.1	131.1e	125
1975 1st quarter	111	101.4	113	104	114	110.2	120	107.8	108	121.3	105.0	106.5	108
2nd	107	92.3	113	104	113	107.0	117	102.3	106	120.7	106.0	109.8	108
3rd	106	83.2	112	104	114	105.9	115	111.1	106	120.8	111.8	112.2	111
4th	110	94.2	117	108	116	110.8	123	102.3	110	122.3	114.4	112.9	114
1976 1st quarter	114	97.5	122	111	121	116.6	124	102.6	113	125.7	118.1	119.8	117
2nd	119	103.7	123	113	123	120.7	126	104.5	115	128.0	120.0	125.0	120
3rd	118	96.6	125	114	126	122.7	127	104.2	116	127.5	121.4	127.0	121
4th	119	97.7	125	115	128	127.9	129	105.9	118	128.4	122.0	129.3	122
1977 1st quarter	120	100.1	129	117	130	131.4	127	107.0	120	131.1	123.9	130.1	124
2nd	119	103.4	125	116	135	122.2	128	105.5	117	131.5	127.1	131.1	125
3rd	114	94.4	125	116	134	120.2	125	105.6	117	131.5	128.4	130.0	125
4th	116	98.8	124	117		118.1	128	104.4	117	132.4	129.2	133.3e	126
1976 January	112	96.4	120	111		112.0	124	101.7	112	124.6	116.6	116.5	115
February	114	98.4	120	112		118.8	124	103.2	114	125.8	118.1	119.0	117
March	117	97.7	122	110		119.0	124	103.2	114	126.6	118.8	122.7	118
April	120	100.6	122	112		118.6	126	104.0	115	127.5	119.1	125.9	119
May	119	108.0	122	111		124.1	125	106.0	115	127.5	120.2	123.4	120
June	121	102.6	123	113		119.5	126	103.2	115	127.2	120.7	125.7	120
July	114	94.1	124	111		122.7	124	104.2	115	126.7	121.2	127.3	120
August	121	86.5	124	113		118.9	127	103.5	115	128.2	121.8	126.7	120
September	120	109.1	129	115		126.4	131	104.8	118	127.5	121.3	127.1	122
October	122	101.6	123	115		122.8	128	105.3	117	127.2	121.0	127.3	121
November	119	96.5	129	115		128.6	127	106.0	119	128.6	122.0	130.4	123
December	121	95.2	125	116		132.3	131	106.2	119	129.4	123.4	130.3	123
1977 January	121	101.6	129	117		131.4	129	107.1	120	131.5	122.7	130.7	124
February	119	96.7	127	116		131.3	126	107.0	119	130.8	123.6	128.4	124
March	121	102.0	129	118		131.6	127	107.0	121	131.1	125.5	131.2	125
April	119	100.0	125	116		123.2	132	105.8	118	130.7	126.3	132.3	125
May	119	105.6	123	115		125.9	127	107.1	117	131.5	127.1	129.6	125
June	120	104.5	128	116		117.4	125	103.6	117	132.5	127.8	131.4	125
July	109	97.9	124	115		118.5	124	106.0	116	131.0	128.7	128.8	124
August	119	84.7	124	116		119.1	125	106.0	117	132.0	128.1	130.3	125
September	116	100.7	126	117		123.0	126	105.8	118	131.5	128.5	130.9	126
October	113	94.4	122	116		117.8	126	104.2	116	131.9	128.8	130.4	125
November	116	103.2	127	117		119.9	125	104.1	117	132.6	129.2	134.1	126
December	120	98.7	123	119		116.6	132	105.2	117	132.8	129.5	135.3e	126
1978 January		107e	127e	121				105.8			128.6		
% change latest three months													
On previous three months	1.5	10.4	1.3	2.3	−0.7	−1.8	2.1	−0.3	−0.3	0.7	0.5	2.5	0.5
On a year earlier	−3.6	5.3	−1.6	2.6	6.3	−7.7	−0.8	−1.3	−1.4	3.1	5.2	3.0	2.7

[1] Excluding Denmark. r Revised.
Source: United Kingdom, Department of Trade; all others 'OECD MEI'.

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Table 3 Unemployment seasonally adjusted [7]

Numbers thousands

	Belgium[2]	Denmark[3]	France[1] r	F.R. of Germany[1]	Ireland[2]	Italy[3 9]	Nether-lands[1]	United Kingdom[1 3]	Canada[2] r	United States[3] r	Japan[3]
1971	71	30	337	185	42	613	62	776	552	4 993	639
1972	87	30	380	246	48	696	108	885	562	4 840	730
1973	92	21	394	274	44	669	110	611	520	4 305	670
1974	105	50	498	583	48	560	135	600[5]	521	5 076	740
1975	177	124	840	1 074	75	654	195	929	697	7 830	1 000
1976	229	126	933	1 060	84	732	211	1 269[5]	736	7 288	1 080
1977	264	154	1 072	1 030		1 545	204	1 379	864 e	6 856	1 100
1975 3rd quarter	189	123	889	1 128	78	648	205	995	712	7 898	1 025
4th	210	123	924	1 142	81	699	210	1 128	726	7 729	1 114
1976 1st quarter	213	118	929	1 139	82	681	208	1 220	703	7 224	1 072
2nd	227	115	928	1 033	84	693	208	1 261	728	7 111	1 102
3rd	238	120	925	1 035	85	776	221	1 300	748	7 363	1 101
4th	238	126	942	1 014	84	777	206	n.a.	770	7 443	1 038
1977 1st quarter	246	139	997	1 022	82	1 459	194	1 330	826	7 161	1 032
2nd	261	147	1 069	1 017	83	1 432	198	1 341	851 e	6 889	1 110
3rd	276	153	1 149	1 058	83	1 692	217	1 415	878	6 736	1 150
4th	276	160	1 069	1 024		1 598	206	1 428	900	6 554	1 126
1978 1st quarter								1 409			
1976 October	231	125	n.a.	1 022	83		214	1 306	n.a.	n.a.	1 058
November	243	125	n.a.	1 009	83		207	n.a.	n.a.	n.a.	1 084
December	239	128	n.a.	1 011	83		199	1 320	n.a.	n.a.	973
1977 January	242	135	974	1 053	82		196	1 330	786	7 066	1 005
February	245	139	999	1 020	82		193	1 330	835	7 273	1 032
March	250	144	1 017	992	83		192	1 329	858	7 145	1 057
April	254	144	1 037	1 015	82		192	1 334	868	6 869	1 030
May	262	147	1 066	1 008	83		197	1 324	838 e	6 894	1 127
June	267	149	1 105	1 028	83		206	1 364	848	6 904	1 172
July	272	150	1 140	1 066	83		212	1 399	866	6 719	1 189
August	282	154	1 174	1 066	84		220	1 410	881	6 821	1 143
September	275	155	1 132	1 043	82		218	1 435	887	6 668	1 118
October	272	156	1 092	1 033	81		212	1 432	887	6 688	1 055
November	283	160	1 065	1 028	81		207	1 430	903	6 663	1 150
December	272	163	1 051	1 010			198	1 422	911	6 310	1 172
1978 January	274	169 e	1 023	1 016			195	1 419	891	6 226	1 112
February	276 e			1 027				1 409	901	6 090	
March								1 400			
Rate % in latest month	10.2 e	7.8 e	5.6	4.5	11.6	n.a.	4.9	5.9	8.3	6.1	2.1
% change latest three months											
On previous three months	−1.0	5.8	−7.6	−1.7	−2.4	−5.6	−7.7	−1.3	1.0	−7.0	3.6
On a year earlier	13.2	26.8	n.a.	−1.0	−2.4	n.a.	−0.3	6.0	n.a.	n.a.	12.1

Unemployment data are defined and collected on different bases in different countries. The following notes indicate main variations preventing direct international comparison. [1] *Registered unemployed (excluding school leavers)*: *rate per cent of total employees.* [2] Insured unemployed: rate per cent of total insured population. [3] Labour force sample survey: rate per cent of total labour force. [4] Unemployment-insurance beneficiaries: rate per cent of total numbers insured. [5] Estimated in the absence of one month's figures. [6] Averaged over component months. Rates per cent relate to the last period for which unemployment figures are given. [7] Some seasonally adjusted data have been estimated from *unadjusted material.* [8] *UK per cent changes are calculated with a non-rounded series.* [9] From 1977, new method of calculating unemployment which is not consistent with the other figures. e Estimated. n.a. Not available. r Revised. Source: 'OECD Main Economic Indicators' and *Department of Employment Gazette.*

Table 5 Consumer prices All goods and services

Indices 1970 = 100

	Belgium	Luxem-bourg	Denmark	France	F.R. of Germany	Ireland	Italy	Nether-lands	United Kingdom	EEC	Canada	United States	Japan	OECD
1971	104.3	104.7	106	105.3	105.3	108.9	104.8	107.5	109.4	106	102.9	104.3	106.1	105
1972	110.0	110.1	113	111.7	111.1	118.4	110.8	115.9	117.2	113	107.8	107.7	110.9	110
1973	117.7	116.8	123	119.9	118.8	131.8	122.4	125.2	128.0	122	116.0	114.4	123.9	119
1974	132.6	128.0	142	136.3	127.1	154.2	146.2	137.3	148.4	138	128.6	127.0	154.2	134
1975	149.6	141.7	156	152.2	134.7	186.4	171.3	151.3	184.4	157	142.5	138.6	172.4	150
1976	163.2	155.6	170	166.8	140.8	219.9	199.6	164.6	214.9	175	153.2	146.6	188.4	163
1977	174.8	166.0	189	182.7	146.3	249.9	236.6 e	175.6	249.0	195	165.4	156.1	203.6	178
1975 1st quarter	143.9	136.3	152	147.0	132.0	177.7	164.9	145.8	166.9	150	137.1	135.0	166.4	144
2nd	147.7	140.1	156	150.6	134.5	188.5	169.3	149.9	182.7	156	140.1	137.1	172.1	148
3rd	151.1	143.1	158	153.9	135.5	187.1	172.9	152.9	190.8	160	144.9	140.1	173.6	151
4th	155.5	147.3	157	157.3	136.7	192.2	178.1	156.3	197.3	163	147.9	142.3	177.7	155
1976 1st quarter	158.7	151.1	162	161.1	139.0	206.3	184.8	159.0	204.4	168	149.8	143.7	181.4	158
2nd	161.8	154.5	168	164.8	141.1	219.1	196.5	164.3	211.9	173	152.1	145.5	187.7	161
3rd	164.9	156.9	171	168.6	141.2	222.4	201.7	165.4	216.8	176	154.3	147.8	189 8	164
4th	167.6	159.7	178	172.9	141.9	231.8	215.5	169.6	226.8	182	156.6	149.4	194.5	168
1977 1st quarter	170.9	163.4	180	175.6	144.6	240.7	225.2	170.8	238.2	188	159.9	152.1	198.8	172
2nd	173.7	165.9	185	181.0	146.5	249.7	233.8	175.8	248.8	194	163.7	155.3	204.2	176
3rd	176.3	167.0	190	185.3	146.9	252.4	239.7	176.9	252.7	197	167.3	157.6	204.8	179
4th	178.3	167.7	200	188.8	147.2	256.8	247.7 e	178.8	256.4	200	170.9	159.4	206.5	183
1976 October	166.9	158.7	176	171.8	141.5		211.1	169.5	223.7	181	156.1	149.0	193.8	167
November	167.5	159.7	178	173.2	141.8	231.8	215.7	169.7	226.8	182	156.6	149.4	193.8	167
December	168.4	160.8	179	173.8	142.5		218.6	169.7	229.8	184	157.1	149.9	195.8	169
1977 January	170.1	162.4	179	174.3	143.8		221.4	169.5	235.9	186	158.4	150.7	197.7	170
February	171.4	163.5	179	175.5	144.7	240.7	225.7	170.8	238.2	188	159.9	152.3	198.8	172
March	171.3	164.2	181	177.1	145.2		228.5	172.2	240.5	190	161.5	153.2	200.0	173
April	172.2	165.2	183	179.4	145.9		231.3	175.1	246.7	192	162.4	154.4	203.3	175
May	173.9	165.8	186	181.1	146.5	249.7	234.2	176.0	248.6	194	163.8	155.3	205.2	176
June	175.0	166.7	187	182.5	147.2		235.8	176.4	251.2	195	164.9	156.3	204.1	178
July	175.5	167.4	188	184.1	147.0		237.2	176.1	251.4	196	166.5	157.0	203.6	178
August	176.1	167.0	190	185.1	146.9	252.4	239.4	176.7	252.7	197	167.2	157.6	203.6	179
September	177.3	166.6	192	186.7	146.7		242.5	177.8	254.0	198	168.1	158.2	207.2	181
October	177.7	167.3	199	188.2	146.9		245.7	178.4	255.1	199	169.8	158.6	208.3	182
November	178.3	168.1	200	188.9	147.1	256.8	248.1	179.0	256.4	200	170.9	159.4	205.8	183
December	179.0	167.8	201	189.4	147.5		249.3	178.9	257.7	201	172.0	160.0	205.3	183
1978 January	179.9	168.5	201	190.3	148.4		251.8 e	178.2	259.2	202 e	172.6	160.7	206.2	185
February	180.6	168.9			149.1 e		254.3 e	178.9 e	260.8					
Latest month on same month a year earlier	5.4	3.3	12.3	9.2	3.0	10.8	12.7	4.7	9.5	8.6	9.0	6.6	4.3	8.8
Latest three months on previous three months	1.2	0.6	3.6	1.5	1.0	1.7	2.6	0.1	1.6	1.5	2.1	1.2	−0.3	1.7
Latest three months on a year earlier	5.8	3.8	12.3	9.1	3.2	10.8	13.5	5.1	10.5	9.2	9.2	6.7	5.1	8.9

Source: OECD main economic indicators.

Table 8 **Exports (fob)** Special trade[1], seasonally adjusted [3]

US $ million

	Belgium/ Luxembourg	Denmark[2]	France	F.R. of Germany	Ireland[2]	Italy	Nether- lands	United Kingdom[2]	EEC	Canada	United States[2]	Japan[2]	OECD
1970	11 592	3 288	17 940	34 188	1 032	13 188	11 772	19 382	112 356	16 134	43 224	19 320	220 045
1971	12 081	3 609	20 592	39 009	1 308	15 177	13 953	22 365	128 084	17 676	44 211	23 994	246 037
1972	15 995	4 330	25 739	46 208	1 610	18 535	15 392	24 415	153 152	20 184	49 676	28 591	290 784
1973	22 416	6 120	35 952	67 440	2 124	22 236	23 952	30 662	210 684	25 200	71 316	36 936	398 880
1974	28 260	7 716	45 900	89 160	2 628	30 288	32 436	38 827	275 100	32 784	98 508	55 536	532 932
1975	28 812	8 712	52 212	90 024	3 216	34 824	34 440	44 270	295 992	32 304	107 652	55 752	567 804
1976	32 844	9 108	55 812	102 036	3 312	36 924	38 748	46 542	325 044	38 628	114 996	67 224	630 492
1977		10 068	63 516	117 900	4 392			57 526		41 112			
1976 1st quarter	7 404	2 121	13 272	23 280	741	8 475	8 907	11 474	75 747	9 102	26 190	155 64	147 051
2nd	7 746	2 226	13 851	24 609	819	8 862	8 883	11 452	78 459	9 555	28 668	16 467	153 456
3rd	8 217	2 340	14 007	26 148	837	9 414	9 909	11 523	82 329	9 996	29 649	17 037	161 079
4th	9 144	2 445	14 586	27 456	885	9 972	11 001	11 093	87 399	9 402	29 499	17 787	166 380
1977 1st quarter	9 069	2 532	15 108	27 897	963	10 467	10 623	12 977	89 619	10 363	29 463	19 479	171 291
2nd	9 123	2 358	15 252	28 788	1 014	11 481	10 536	14 292	92 853	10 211	30 573	19 710	176 115
3rd	9 261	2 526	16 242	29 541	1 200	10 971	11 220	14 950	95 958	10 476	30 849	20 136	180 603
4th		2 688	17 286	31 755	1 221			15 307		10 281			
1976 July	2 364	757	4 435	8 040	266	3 131	3 123	3 691	25 800	3 253	9 905	5 576	51 770
August	2 766	785	4 713	8 378	257	3 032	3 381	3 901	27 157	3 432	9 843	5 545	53 289
September	3 021	798	4 733	9 434	308	3 165	3 353	3 932	28 738	3 313	9 902	5 857	55 449
October	3 148	767	4 753	9 024	323	3 387	3 435	3 916	28 710	3 138	9 725	5 988	54 652
November	2 880	827	4 782	9 097	290	3 493	3 846	3 940	29 069	3 021	9 342	5 733	54 696
December	3 179	840	5 021	9 648	291	3 208	3 960	4 238	30 326	3 244	10 433	5 964	57 713
1977 January	3 032	852	5 175	9 285	309	3 517	3 654	4 347	30 164	3 308	9 597	6 696	57 100
February	2 950	816	5 058	9 147	323	3 299	3 643	4 293	29 521	3 378	9 801	6 499	56 507
March	3 174	880	5 049	9 702	325	3 578	3 393	4 336	30 435	3 677	10 066	6 551	58 373
April	2 997	847	4 968	9 093	334	3 883	3 542	4 698	30 364	3 451	9 949	6 894	57 997
May	2 946	722	5 314	9 584	327	3 819	3 431	4 642	30 792	3 283	10 540	6 282	58 250
June	3 123	793	5 021	9 938	342	3 867	3 356	4 951	31 396	3 477	10 084	6 494	59 420
July	2 978	818	5 162	9 482	397	3 549	3 666	5 021	31 081	3 564	10 279	6 910	59 282
August	2 989	846	5 411	9 861	397	3 850	3 844	4 823	32 040	3 548	9 675	6 661	59 806
September	3 293	861	5 670	10 199	405	3 571	3 709	5 106	32 838	3 364	10 896	6 565	61 515
October	3 176	835	5 765	10 369	353	3 585	3 670	5 017	32 786	3 526	9 257	6 819	60 129
November	3 173	890	5 488	10 197	418	3 992	3 776	4 898	32 851	2 917	9 224	7 145	60 191
December		962	6 034	11 188	461			5 392		3 839			
% change latest three months:													
On previous three months	6.1	6.4	6.4	7.5	1.9	−1.0	2.7	2.4	4.2	−1.9	−2.2	2.3	1.9
One year earlier	6.6	10.4	18.8	14.4	35.2	11.0	4.9	26.6	13.8	9.3	1.4	16.8	10.3

[1] For most purposes special trade may be defined as trade excluding re-exports. [2] General trade. [3] The OECD has revised the seasonally adjusted figures. It has been possible to include only the published revisions at this stage. For this reason the monthly figures do not necessarily add to the quarters and the percentage changes are distorted by the discontinuity in the monthly figures between June and July 1977. r Revised.

Source: United Kingdom. Department of Trade; all others: 'OECD Series "A" '.

Table 9 **Imports (cif)** Special trade[1], seasonally adjusted [3]

US $ million

	Belgium/ Luxembourg	Denmark [2]	France	F.R. of Germany	Ireland [2]	Italy	Nether- lands	United Kingdom[2]	EEC	Canada[4]	United States[2 4]	Japan	OECD
1970	11 352	4 380	19 116	29 808	1 572	14 940	13 392	21 696	116 280	13 308	39 960	18 876	225 649
1971	12 390	4 476	21 261	34 356	1 838	16 026	15 159	23 918	129 403	15 460	45 633	19 716	250 717
1972	14 879	4 988	26 696	39 759	2 113	19 252	17 127	27 877	152 643	18 924	55 819	23 463	297 984
1973	21 936	7 704	37 380	54 492	2 784	27 816	24 360	38 872	215 232	23 304	69 120	38 316	410 820
1974	29 700	9 852	52 824	68 976	3 816	40 968	33 204	54 344	293 568	32 292	100 968	62 112	583 020
1975	30 708	10 332	54 240	74 208	3 804	38 364	35 148	53 618	300 048	33 960	96 936	57 864	587 376
1976	35 352	12 420	64 392	87 780	4 200	43 368	39 948	56 269	343 428	37 956	121 788	64 800	676 308
1977		13 260	70 488	100 668	5 388			63 740		39 456			
1976 1st quarter	7 656	2 823	14 925	19 836	999	9 984	8 826	13 335	78 297	9 240	27 333	14 973	154 710
2nd	7 995	3 000	15 495	20 967	993	10 644	9 378	13 942	82 506	9 630	29 295	15 300	161 979
3rd	8 427	3 165	16 413	22 476	1 068	10 737	10 086	14 386	86 760	9 612	32 043	17 004	173 259
4th	9 174	3 330	17 493	24 078	1 122	11 859	11 907	14 606	93 240	9 405	32 631	17 427	182 727
1977 1st quarter	9 513	3 318	17 409	24 171	1 257	11 781	11 292	15 322	94 101	9 876	35 439	17 721	186 150
2nd	9 483	3 240	17 196	24 114	1 272	12 276	11 214	16 429	95 292	10 192	37 685	17 139	190 431
3rd	9 414	3 384	17 721	25 593	1 422	11 010	11 514	15 779	95 952	9 884	37 629	17 880	192 669
4th		3 303	18 471	27 102	1 476			16 210		9 669			
1976 July	2 639	908	4 941	7 089	332	3 422	3 238	4 840	27 426	3 199	10 992	5 473	55 988
August	2 767	1 079	5 498	7 778	350	3 643	3 415	4 656	29 150	3 268	10 377	5 699	58 019
September	2 885	1 139	5 896	7 563	376	3 555	3 350	4 891	29 668	3 144	10 673	5 833	58 814
October	3 028	1 048	5 825	7 748	355	3 782	3 645	4 724	30 171	3 066	10 748	5 785	58 946
November	3 088	1 089	6 064	7 763	392	4 532	3 567	4 947	31 495	3 230	10 679	6 064	61 874
December	3 109	1 217	5 740	8 730	378	3 742	4 446	4 935	32 203	3 108	11 204	5 588	62 879
1977 January	3 346	1 090	6 053	8 349	463	3 870	4 075	5 520	32 781	3 257	11 430	6 173	63 065
February	3 070	1 062	5 725	7 818	418	3 995	3 803	4 872	30 777	3 326	11 582	5 677	61 071
March	3 229	1 230	5 791	8 183	415	3 968	3 505	4 930	31 264	3 294	12 427	5 873	62 675
April	3 171	1 042	5 412	7 707	399	4 240	3 764	5 183	30 945	3 482	12 721	5 742	62 334
May	3 153	1 042	5 672	8 112	418	4 276	3 723	5 394	31 811	3 394	12 050	5 785	62 827
June	3 141	1 127	5 998	8 063	429	3 699	3 695	5 851	32 023	3 316	12 914	5 614	64 433
July	2 854	1 073	5 692	8 606	461	3 700	3 788	5 475	31 687	3 339	12 877	5 731	63 948
August	3 390	1 137	6 052	8 393	468	3 736	3 963	4 936	32 114	3 285	11 984	6 184	64 539
September	3 171	1 175	5 975	8 594	493	3 574	3 762	5 369	32 150	3 260	12 768	5 965	64 182
October	3 212	1 089	5 944	8 557	483	4 181	3 741	5 337	32 570	3 329	12 494	5 964	64 671
November	3 390	1 093	6 429	8 773	476	3 907	3 911	4 998	33 011	2 886	11 469	6 182	63 737
December		1 120	6 099	9 771	516			5 875		3 454			
% change latest three months:													
On previous three months	4.1	−2.4	4.2	5.9	3.7	4.7	−0.3	2.7	2.0	−2.2	−2.8	3.3	−0.2
One year earlier	8.6	−0.8	5.6	12.6	31.1	−1.7	8.1	11.0	7.0	2.8	14.4	2.5	7.2

[1] For most purposes special trade may be defined as trade excluding re-exports. [2] General trade. [3] The OECD has revised the seasonally adjusted figures. It has been possible to include only the published revisions at this stage. For this reason the monthly figures do not necessarily add to the quarters, and the percentage changes are distorted by the discontinuity in the monthly figures between June and July 1977. [4] fob.

Source: United Kingdom, Department of Trade; all others: 'OECD Series "A" '

Trends in invisibles in 1977

In 1977 the surplus on invisibles was £1,577 million, considerably below the surplus of £2,403 million in 1976. This change however conceals contrasting movements within the invisibles account. Gross invisible credits rose by 11 per cent to £15,596 million in 1977, but gross invisible debits increased by 20 per cent to £14,019 million. Earnings from travel were particularly high last year and earnings from construction work overseas, insurance and banking also grew strongly. On the other hand, the net balance of interest, profits and dividends, declined markedly.

The net earnings from sea transport operations were in deficit by £74 million in 1977, after being in small surplus for the previous two years. Throughout the year, excess capacity in the world tanker fleet gave rise to lower receipts and payments than in 1976. The dry cargo figures were affected by the slower than expected growth in world trade and depressed freight rates, and payments increased faster than receipts.

The net surplus on the civil aviation account in 1977 at £214 million was slightly lower than the £241 million surplus in 1976. Some of this decline probably reflects the strike by British Airways' maintenance engineers in April and the operating difficulties the industry experienced in the third quarter.

The earnings on the overseas travel account increased considerably faster than expenditure in 1977, and the surplus rose to just over £1 billion compared with £620 million in 1976. Visits to the UK exceeded those abroad for the first time.

Earnings from financial services increased by £87 million to £1,294 million during the year. Receipts from insurance and banking services increased by £117 million and £50 million, respectively, but there was a fall of £103 million in earnings from commodity trading.

The net surplus on 'other services' increased by £257 million to £857 million in 1977. Within credits, contractors' overseas earnings and expenditure in the UK by foreign students both rose by over 30 per cent with increases of £68 million and £69 million, respectively. Within debits, imports of services for North Sea oil and gas activities and payments for telecommunications and postal services both rose by around 20 per cent with rises of £100 million and £29 million, respectively.

The net surplus on interest, profit and dividends fell to £283 million in 1977 from £1,308 million in 1976. Almost all of the decline was due to the fall of nearly £1 billion in the net earnings of the private sector (including public corporations); the general government sector net deficit increased by only £36 million to £688 million.

UK companies' net earnings from direct investment overseas fell by £114 million, reflecting the stagnation in world output and, to a lesser extent, the appreciation in the sterling exchange rate in 1977. On the other hand, foreign companies' earnings from their direct investment in the UK rose by nearly £280 million, reflecting the increased profitability of the company sector in this country.

Receipts from overseas portfolio investment

Invisibles

£ million

						1977 seasonally adjusted			
	1973	1974	1975	1976	1977	1st qtr	2nd qtr	3rd qtr	4th qtr
CREDITS									
Private services [1]:									
Sea transport:									
Freight and fares	1 543	1 861	1 730	2 125					
Charter receipts	282	511	567	658					
Disbursements of overseas shipping	237	306	372	468					
Total	2 062	2 678	2 669	3 251	3 378	863	874	851	790
Civil aviation:									
Fares, freights, etc	358	451	560	766					
Disbursements of overseas airlines	122	174	220	285					
Total	480	625	780	1 051	1 199	290	296	288	325
Travel	681	837	1 123	1 628	2 129	510	525	574	520
Financial services	593	760	1 007	1 207	1 294	275	311	360	348
Other services:									
Films and television	28	26	37	45					
Royalties, etc	201	246	275	340					
Miscellaneous	906	1 107	1 407	1 799					
Total	1 135	1 379	1 719	2 184	2 729	633	683	695	718
Total private services [1]	4 951	6 279	7 398	9 421	10 729	2 571	2 289	2 768	2 701
Interest, profits and dividends:									
Direct investment	1 450	1 490	1 583	2 194	2 080	523	558	519	480
Portfolio investment	192	232	221	234	264	69	63	66	66
Oil and other	1 250	1 445	1 142	1 448	1 529	386	345	394	404
Total	2 892	3 167	2 946	3 876	3 873	978	966	979	950
Transfers:									
Private	295	355	395	425	481	110	116	125	130
Government	63	130	363	251	283	74	58	60	91
Government services	104	110	139	215	230	40	45	68	77
Total credits	8 305	10 041	11 141	14 088	15 596	3 773	3 874	4 000	3 949
DEBITS									
Private services [1]:									
Sea transport:									
Freight and fares	721	934	855	1 076					
Charter payments	778	799	660	803					
Disbursements abroad	661	1 063	1 090	1 327					
Total	2 160	2 796	2 805	3 206	3 452	883	867	867	835
Civil aviation:									
Freight, fares, etc	195	239	321	369					
Disbursements abroad	210	290	343	441					
Total	405	529	664	810	985	228	246	255	256
Travel	682	683	878	1 008	1 118	280	278	250	310
Other services:									
Films and television	25	27	34	40					
Royalties, etc	160	199	239	297					
Miscellaneous	512	727	1 092	1 247					
Total	697	953	1 365	1 584	1 872	430	441	500	501
Total private services [1]	3 944	4 961	5 512	6 608	7 427	1 821	1 832	1 872	1 902
Interest, profits and dividends:									
Direct investment	698	609	615	1 045	1 324	316	342	365	301
Portfolio investment	180	236	288	354	518	118	132	131	137
Oil and other	691	1 016	1 143	1 169	1 748	372	462	426	488
Total	1 569	1 861	2 046	2 568	3 590	806	936	922	926
Transfers:									
Private	386	441	491	494	588	138	129	147	174
Government	422	450	742	1 043	1 392	314	328	374	376
Government services	513	648	759	972	1 022	252	249	256	265
Total debits	6 834	8 361	9 550	11 685	14 019	3 331	3 474	3 571	3 643
NET BALANCES									
Private services [1]	+1 007	+1 318	+1 786	+2 713	+3 302	+750	+857	+896	+799
Interest, profits and dividends	+1 323	+1 306	+900	+1 308	+283	+172	+30	+57	+24
Private transfers	−91	−86	−96	−69	−107	−28	−13	−22	−44
Government transfers	−359	−320	−379	−792	−1 109	−240	−270	−314	−285
Government services	−409	−538	−620	−757	−792	−212	−204	−188	−188
Net invisible balance	+1 471	+1 680	+1 591	+2 403	+1 577	+442	+400	+429	+306

[1] Including public corporations.

were higher in 1977, but this was more than offset by a large increase in payments overseas on non-residents' portfolios. Payments by the government on the much higher level of gilts held by non-residents accounted for nearly half this increase, and another third was accounted for by higher interest payments on foreign currency issues raised under the exchange cover scheme.

UK oil companies' earnings on their direct investment overseas were higher in 1977 than in 1976, though they declined through 1977 as overseas profit margins were squeezed. But this increase was more than offset by the turnaround from a net loss in 1976 to a profit of over £400 million in 1977 by foreign-owned oil companies in the UK. The losses in 1976 were due mainly to high exploration costs, but they were more than offset by the value of higher production in 1977.

Interest paid overseas by the government on its Euro-currency borrowing and to the IMF increased in 1977, though to some extent these were partly compensated for by a rapid rise in earnings of the official reserves. The net overseas earnings of UK banks were much lower in 1977 than in 1976 reflecting in the main a narrowing of margins between borrowing and lending on Euro-currency transactions, a reduction in sterling lending to overseas residents, and an increase in payments to non-residents resulting from the rapid expansion during 1977 of non-residents' sterling deposits in UK banks.

The deficit on government transfers in 1977, at £1,109 million, was over £300 million higher than 1976, mainly because of an increase of £276 million to £750 million in contributions to the EEC budget, a direct result of the UK's increased participation in the EEC. The deficit on private transfers was £107 million in 1977 compared with £69 million in 1976.

Inquiries: 01-215 3135.

Interest, profits and dividends by sector

£ million

	1973	1974	1975	1976	1977	1977 seasonally adjusted 1st qtr	2nd qtr	3rd qtr	4th qtr
Credits									
Private sector [1]	2 716	2 930	2 680	3 623	3 460	913	885	862	800
General government	176	237	266	253	413	65	81	117	150
Debits									
Private sector [1]	1 193	1 269	1 263	1 663	2 489	551	651	659	628
General government	376	592	783	905	1 101	255	285	263	298
Net balance									
Private sector [1]	+1 523	+1 661	+1 417	+1 960	+971	+362	+234	+203	+172
General government	−200	−355	−517	−652	−688	−190	−204	−146	−148

[1] Including public corporations.

Retail sales in February

Volume

The final seasonally adjusted index of the volume of retail sales in February is 106.8 (1971 = 100), close to the provisional estimate 106½.

The estimate suggests that trade in both food shops and non-food shops in recent months has moved rather erratically with a recovery in February following the fall in January. The average level of sales remains above that of the fourth quarter of 1977. In the three months December to February the volume of sales was 3 per cent higher than in the previous three months.

For the main components of total trade, the volume of sales by durable goods shops in the three months December to February was 7 per cent higher than in the previous three months. Sales by clothing and footwear shops rose by 4 per cent while sales by 'other non-food' shops, which include department stores

Table 1 Volume of retail sales seasonally adjusted

Index numbers of sales per week (average 1971 prices) 1971 = 100

(Sales in 1971 – £ million Final estimates)	All kinds of business (16,296)	Food shops (6,866)	Non-food shops Total (9,430)	Clothing and footwear shops (2,436)	Durable goods shops (1,897)	Other non-food shops [2] (5,097)
1971	100.0	100.0	100.0	100	100	100
1972	105.3	101.6	107.9	104	113	108
1973	110.3	101.6	116.6	108	127	117
1974	109.0	102.4	113.8	106	122	115
1975	106.7	100.0	111.5	106	119	111
1976	106.5	98.7	112.1	106	122	111
1977	103.6	94.8	110.0	105	119	109
1976						
1st qtr	105.9	99.5	110.6	105	117	111
2nd	106.9	99.6	112.1	106	122	111
3rd	107.3	99.1	113.2	106	125	112
4th	105.9	96.8	112.6	105	124	112
1977						
1st qtr	103.3	94.9	109.3	105	116	109
2nd	102.5	94.7	108.2	101	118	108
3rd	104.3	94.4	111.5	107	121	110
4th	104.4	95.3	111.1	109	121	109
1977						
February	104.0	95.2	110.5	105	118	110
March [1]	101.7	94.4	106.9	103	109	108
April	102.3	94.3	108.1	101	118	107
May	103.2	95.0	109.2	104	117	109
June [1]	102.1	94.7	107.4	99	118	107
July	104.8	94.3	112.4	107	125	110
August	104.7	94.4	112.3	110	118	111
September [1]	103.5	94.4	110.2	106	121	108
October	102.7	94.2	108.9	103	120	108
November	103.1	93.9	109.8	107	118	108
December [1]	106.9	97.3	113.9	114	125	110
1978						
January	104.9	95.1	112.0	105	129	109
February	106.8	96.8	114.1	109	130	111
1977						
September-November	103.1	94.2	109.7	105	120	108
1977-78						
December-February	106.3	96.5	113.4	110	127	110
Percentage increase	3.1	2.4	3.4	4	7	2

[1] Five-week period.
[2] Including department stores and mail-order businesses.

Table 2 Value of retail sales seasonally adjusted

Index numbers of value of sales per week (current prices) 1971 = 100

(Sales in 1971 – £ million Final estimates)	All kinds of business (16,296)	Food shops (6,866)	Non-food shops Total (9,430)	Clothing and footwear shops (2,436)	Durable goods shops (1,897)	Other non-food shops [2] (5,097)
1971	100.0	100.0	100.0	100	100	100
1972	112.0	109.0	114.2	112	118	114
1973	126.9	123.0	129.8	128	136	128
1974	146.7	144.9	148.1	148	144	149
1975	174.4	175.0	174.0	171	168	178
1976	200.1	204.8	196.7	189	187	204
1977	228.0	234.7	223.1	216	206	233
1976						
1st qtr	189.6	193.4	186.8	179	177	194
2nd	196.1	200.3	193.0	187	185	199
3rd	203.4	208.0	200.1	193	190	207
4th	211.4	217.4	207.0	198	197	215
1977						
1st qtr	216.4	223.8	211.0	204	192	222
2nd	222.0	230.4	215.8	204	202	227
3rd	234.2	239.4	230.4	224	213	240
4th	239.4	245.3	235.1	231	219	243
1977						
February	217.4	224.0	212.6	204	196	223
March [1]	216.1	225.0	209.7	204	185	222
April	219.9	226.8	214.9	201	205	225
May	222.9	230.3	217.5	209	199	228
June [1]	222.9	233.5	215.2	202	202	227
July	231.5	236.6	227.8	220	213	237
August	235.8	239.5	233.0	230	209	243
September [1]	235.0	241.4	230.3	222	217	239
October	234.2	241.7	228.7	218	214	239
November	236.3	242.3	231.9	228	213	241
December [1]	246.0	250.6	242.7	244	227	248
1978						
January	241.0	245.0	238.0	223	233	247
February	246.5	249.4	244.4	235	237	252
1977						
September-November	235.2	241.8	230.3	223	215	240
1977-78						
December-February	244.6	248.5	241.8	235	232	249
Percentage increase	4.0	2.8	5.0	5	8	4

[1] Five-week period.
[2] Including department stores and mail-order businesses.

and mail order businesses, rose by 2 per cent. Sales by food shops rose by 2 per cent between these periods.

Value

Based on non-seasonally adjusted data, the value of total retail sales in February was 13 per cent higher than in February 1977. In January and February, the average value of sales was 13 per cent higher than in the corresponding period of 1977.

Notes to tables

The indices for all shops, food shops, and total non-food shops are shown to the first decimal place to help interpretation, but should not be regarded as necessarily accurate to the final digit. The best indication of the recent trend is normally obtained by comparing the average index for the latest three months with the average for the immediately preceding three months, but month-to-month fluctuations may sometimes make it preferable to average two months or four months.

When using the volume figures, it should be borne in mind that, when price increases are large, the various problems associated with revaluation of the value series to constant prices become more acute. Thus, the relative accuracy with which volume changes have been measured is likely to have been reduced in recent periods.

The monthly periods consist of four weeks except those marked [1] which are of five weeks. The February 1978 sales period was the four weeks from 29 January 1978 to 25 February 1978. The corresponding period in 1977 was the four weeks from 30 January 1977 to 26 February 1977.

The value estimates are compiled inclusive of VAT, and will, therefore, reflect changes in the rates of VAT. The volume estimates, however, are not affected by these changes since the retail price indices used to 'deflate' the value data are themselves inclusive of VAT.

Within the total, sales are analysed by 'kinds of business'; ie the statistics are of sales by particular kinds of shop rather than of sales of particular commodities. For example, while sales by shops classified as food shops are mainly of food, many of them also sell other goods. Similarly, some food is sold by shops classified to other kinds of business.

The seasonally adjusted series include, where appropriate, adjustments for the timing of holidays and adjustments to make allowance for the inclusion of an extra week in the January 1975 trading period. No adjustments are made to the non-seasonally adjusted data.

The article giving the provisional estimate of the seasonally adjusted index of the volume of retail sales for March and the increase in the value of sales compared with a year earlier will be published later this month.

Inquiries: 01-215 3705.

Hire purchase and other instalment credit business in February 1978

Finance houses and retailers advanced £419 million in new instalment credit in February, after allowing for seasonal factors. Within this total, finance houses' lending was lower than in December and January but slightly higher than in November. Retailers' lending was virtually the same as in January. In the latest three months, December to February, total advances were 8 per cent higher than in the previous three months September to November. Finance houses' lending increased by 12 per cent between these two three-month periods and retailers' lending by 5 per cent.

The average weekly value of retailers' instalment credit sales in February was about the same as in January. In the latest three months, average sales were 4 per cent higher than in the previous three months. Within this total, durable goods shops' sales increased by 13 per cent, department stores' sales (including those by co-operative societies) decreased by 1 per cent and other instalment credit retailers' sales (mainly mail-order business) increased by 2 per cent.

Table 1 Hire purchase and other instalment credit business seasonally adjusted

£ million

	Total		Finance houses[1]		Retailers[2]	
	New credit extended	Change in debt	New credit extended	Change in debt	New credit extended	Change in debt
1971	2 036	251	990	165	1 046	86
1972	2 466	438	1 222	296	1 244	142
1973	2 846	444	1 453	332	1 393	112
1974	2 508	—164	1 037	—160	1 471	—4
1975	2 981	—13	1 201	—55	1 780	42
1976	3 586	343	1 535	202	2 051	141
1977	4 392	625	2 072	500	2 320	125
1975						
1st qtr	710	—9	284	—9	426	—
2nd	753	10	307	—13	446	23
3rd	749	—8	304	—18	445	10
4th	769	—6	306	—15	463	9
1976						
1st qtr	833	33	340	4	493	29
2nd	872	80	382	56	490	24
3rd	914	103	393	59	521	44
4th	967	127	420	83	547	44
1977						
1st qtr	1 005	137	458	85	547	52
2nd	1 054	138	488	121	566	17
3rd	1 178	188	546	151	632	37
4th	1 221	162	580	143	641	19
1977						
January	321	37	135	13	186	24
February	339	50	156	32	183	18
March	348	53	167	40	181	13
April	345	48	154	41	191	7
May	358	48	170	45	188	3
June	346	43	164	35	182	8
July	359	52	163	41	196	11
August	404	77	201	66	203	11
September	388	60	182	44	206	16
October	371	41	172	35	199	6
November	402	53	199	45	203	8
December	411	63	209	63	202	—
1978						
January	425	79	208	55	217	24
February	419	81	202	56	217	25
1977						
September-November	1 161	154	553	124	608	30
December-February 1978	1 255	223	619	174	636	49
Percentage increase	8		12		5	

[1] Direct business only: ie excluding agreements block discounted with finance houses by retailers. [2] Durable goods shops, department stores and 'other instalment credit retailers'. For further definitions see footnotes to table 2.

Table 2 Retailers' instalment credit sales seasonally adjusted

Index numbers of value of sales per week (current prices) 1971 = 100

	Total[1]	Durable goods shops	Department stores	Other instalment credit retailers[2]
(HP and other instalment credit sales in 1971 £ million[3])	(1130)	(370)	(139)	(621)
1971	100	100	100	100
1972	117	117	106	120
1973	132	119	119	143
1974	139	94	122	169
1975	165	115	143	200
1976	190	136	162	229
1977	217	142	171	272
1975				
1st qtr	158	112	141	189
2nd	165	120	141	198
3rd	165	111	142	202
4th	172	117	146	211
1976				
1st qtr	185	136	166	217
2nd	184	134	151	221
3rd	193	136	165	234
4th	200	138	166	244
1977				
1st qtr	205	135	166	256
2nd	210	136	153	266
3rd	227	148	179	284
4th	227	148	184	283
1977				
January	208	138	173	257
February	204	132	163	256
March [4]	204	135	162	255
April	215	138	147	276
May	211	134	149	270
June [4]	205	136	162	256
July	220	147	170	275
August	229	144	171	292
September [4]	231	151	194	286
October	224	141	179	282
November	228	147	189	285
December [4]	228	155	183	281
1978				
January	243 r	180 r	187 r	293 r
February	244	166	189	302
1977				
September-November av.	228	147	188	285
December-February 1978 av.	238	166	186	291
Percentage Increase	4	13	−1	2

[1] Durable good shops, department stores (including co-operative societies) and 'other instalment credit retailers'. [2] General stores (other than department stores) and general mail-order houses. [3] Excluding sales against checks issued by other organisations. [4] The monthly periods for retailers consists of four weeks except those marked [4] which are of five weeks. The period covered by February 1978 sales was the four weeks from 29 January 1978 to 25 Febraury 1978. The corresponding period in 1977 was from 30 January 1977 to 26 February 1977. r Revised.

The debt outstanding to finance houses and retailers increased by £81 million in February bringing the total increase in the three months December to February to £223 million, compared to £154 million in September to November. Amounts outstanding to finance houses increased by £174 million and those to retailers by £49 million during the latest three-month period. At the end of February, the total amount outstanding to finance houses and retailers was £3,429 million (not seasonally adjusted), 25 per cent more than a year earlier.

Inquiries: Departments of Trade, Industry and Prices and Consumer Protection, Economics and Statistics Division 6a, Room 349, Sanctuary Buildings, 20 Great Smith Street, London SW1P 3DB, tel. 01-215 3162.

Check trading: value of checks issued and amounts outstanding 1974-77

£ million

	Value of checks issued			Value of checks issued		
	Unadjusted	Seasonally adjusted	Amount outstanding	Unadjusted	Seasonally adjusted	Amount outstanding
	1974			1975		
January	6.0	12.2	136.7	8.5	13.8	150.8
February	8.9	12.5	135.0	10.4	14.6	148.1
March	13.2	12.7	130.1	14.6	14.4	143.0
April	10.8	12.3	129.8	11.8	13.3	140.4
May	13.6	13.6	132.0	14.1	14.0	141.0
June	15.8	14.7	133.8	13.4	12.8	139.2
July	12.1	14.8	136.8	10.9	13.2	138.4
August	12.0	15.7	137.7	10.3	13.5	138.9
September	15.9	15.5	138.2	13.7	13.2	134.5
October	14.3	14.7	139.1	13.5	14.0	136.5
November	17.0	14.3	143.8	13.4	13.5	141.9
December	27.9	14.5	157.9	26.1	13.4	154.4
Year	167.5			163.7		
	1976			1977		
January	6.9	13.7	149.6	8.1	16.0	144.3
February	9.9	13.6	144.1	10.4	14.2	142.5
March	12.4	12.4	133.2	12.3	12.4	128.1
April	13.0	14.5	133.6	12.7	14.1	130.7
May	13.7	13.7	133.7	13.3	13.2	131.3
June	15.0	14.5	132.7	12.6	12.1	129.3
July	11.3	13.6	130.3	12.0	14.2	129.0
August	10.2	13.5	133.5	10.1	13.2	124.7
September	14.6	14.1	129.9	14.3	13.6	120.1
October	13.6	14.2	132.4	12.4	12.8	121.4
November	17.6	14.3	139.8	17.8	14.3	128.6
December	28.3	14.4	149.3	28.4	14.2	136.6
Year	166.5			164.3		

Check trading in 1977

During 1977, the total value of checks issued was £164.3 million, much the same as in previous years. It compares with total amounts of credit advanced by retailers and finance houses in 1977 of £2,320 million and £2,072 million respectively. The first official statistics on check trading were published in the 12 August 1977 issue of *Trade and Industry*.

The total debt outstanding on checks at the end of 1977 was £136.6 million, slightly lower than in previous years. The corresponding figure for debt outstanding to retailers and finance houses at the end of 1977 was £3,341 million.

The stability of the check trading figures continues to reflect the movement away from credit checks and into other forms of instalment credit, and in particular to personal loans, advanced by check trading companies.

The seasonally adjusted figures in the table have been amended to take account of recent experience.

Inquiries: Departments of Industry, Trade, and Prices and Consumer Protection, Economics and Statistics Division 6a, Room 349, Sanctuary Buildings, 20 Great Smith Street, London SW1P 3DB, tel. 01-215 3162.

Poor year for textiles in 1977

Home demand (table 1)
Consumers' expenditure on clothing in the fourth quarter of 1977 maintained the high level reached in the third quarter. The year as a whole showed a rise of more than 2 per cent over 1976, in contrast to the fall in total consumers' expenditure. The demand for household textiles fell back in the fourth quarter, leaving 1977 slightly down on 1976. Consumer spending is expected to increase in 1978, and the demand for textile and clothing products should benefit from this.

Output (table 2)
The output of the textile industry declined further in the fourth quarter and was 2 per cent below the levels in the second and third quarters. In 1977 as a whole output was no higher than in 1975, which, it was hoped, marked the low point of the cycle, but the recovery which appeared to be starting in 1976 completely fizzled out last spring. Only the woollen and worsted sector showed a rise in output in 1977. Both man-made fibres and spinning and doubling on the cotton system were over 10 per cent lower than in 1976, with man-made fibre production falling rapidly in the third and fourth quarters. Although showing some recovery from a very low second quarter, deliveries of carpets were down by nearly 10 per cent in 1977. On a brighter note, good export performance enabled deliveries of made-up clothing to show a rise of 6 per cent in 1977.

Tighter controls on low-cost imports under the renegotiated multi-fibre arrangement should help the industry to take advantage of any upturn in demand.

Prices (table 5)
The wholesale price index of materials and fuel purchased by the textile industries

Table 1 Comparison of textile and clothing output with some factors affecting demand

Index numbers 1970 = 100 (quarterly figures seasonally adjusted)

								1976				1977				Growth rate per cent per annum	Growth per cent 12 months ended
	1971	1972	1973	1974	1975	1976	1977	1st qtr	2nd qtr	3rd qtr	4th qtr	1st qtr	2nd qtr	3rd qtr	4th qtr	1971/77	Q4 1977/ Q4 1976
Gross domestic product at factor cost (expenditure based)	102.7	104.0	111.6	110.2	107.8	111.2	111.2	111.1	110.5	111.1	112.3	110.7	111.9	111.9	110.5	+1.3	Nil
Consumer's expenditure																	
All items	103.2	109.0	114.1	112.7	111.4	111.8	110.9	111.2	111.1	112.2	112.8	110.6	109.2	111.5	112.4	+1.2	−0.8
Clothing [1]	101.8	108.1	113.8	112.4	114.2	115.2	117.9	113.3	114.7	116.4	116.6	116.2	114.3	120.6	120.4	+2.5	+2.3
Household textiles and soft furnishings	104.3	113.6	117.9	115.4	116.1	120.1	119.3	120.0	117.1	121.4	122.9	122.9	117.1	120.0	117.1	+2.3	−0.7
Output of total manufacturing	100.1	102.3	110.1	106.3	100.6	101.4	102.4	100.1	101.6	100.9	102.9	103.2	101.9	102.7	101.7	+0.4	+1.0
Output of textiles	100.6	102.9	108.6	99.2	93.8	97.4	93.7	97.1	95.7	97.5	99.4	98.7	92.5	92.8	90.6	−1.2	−3.8
Deliveries of made-up clothing	104.2	108.7	116.6	114.4	115.3	114.6	121.6	114.2	108.9	122.5	112.7	123.6	119.5	122.3	120.8	+2.6	+6.1

[1] Not comparable with previous series which included footwear.

continued to fall in the fourth quarter of 1977. The price of raw cotton fell by a further 11 per cent compared with the third quarter figure, and was 37 per cent below its peak reached a year previously. The latest information available suggests that the price has turned upwards in the new year. The price of raw wool has declined less rapidly but there is no clear evidence yet of an upturn. These trends have contributed to a lower rate of increase in output prices in the textile industry than occurred in all manufactured products throughout 1977. Only knitted underwear and made-up clothing rose by more than 2 per cent between the third and

Table 2 Output

Index numbers 1970 = 100 (quarterly figures seasonally adjusted)

	1968 MLH	Weights	1971	1972	1973	1974	1975	1976	1977	1976 1st qtr	1976 2nd qtr	1976 3rd qtr	1976 4th qtr	1977 1st qtr	1977 2nd qtr	1977 3rd qtr	1977 4th qtr	Growth rate per cent per annum 1971/77	Growth per cent 12 months ended Q4 1977/ Q4 1976
Man-made fibres	411	14.5	106.1	107.2	127.3	111.1	100.9	112.5	99.5	114.9	112.0	109.6	113.4	112.7	105.5	96.7	83.3	−1.1	−11.6
Spinning and doubling on cotton system [1]	412	11.7	103.2	103.0	112.4	89.5	80.8	85.2	76.4	87.5	81.8	85.3	86.0	83.5	75.9	74.0	72.1	−4.9	−10.3
Weaving of cotton and man-made fibres [2]	413 (part)	6.9	95.3	91.6	93.3	90.3	86.4	85.9	83.8	90.8	84.1	83.1	85.4	87.2	84.9	82.7	80.2	−2.1	−2.4
Woollen and worsted	414	17.6	93.0	97.6	97.7	86.7	77.6	79.5	81.4	77.8	78.9	79.7	81.7	85.8	81.4	77.7	80.9	−2.2	+2.4
Hosiery and other knitted goods	417	19.0	99.5	99.5	102.8	99.8	96.2	101.2	100.7	96.9	98.0	104.5	105.3	101.1	96.2	103.2	102.1	+0.2	−1.0
Carpets	419	8.0	107.8	121.7	125.8	115.5	110.9	109.9	99.6	110.3	108.6	109.3	111.5	106.4	91.9	101.8	98.3	−1.3	−9.4
(order XIII) [3]		100.0	100.6	102.9	108.6	99.2	93.8	97.4	93.7	97.1	95.7	97.5	99.4	98.7	92.5	92.8	90.6	−1.2	−3.8

[1] Includes texturing of man-made continuous filament yarns. [2] Excludes linen. [3] In addition to sectors listed above includes jute, rope, twine and net, lace, narrow fabrics, made-up textiles, textile finishing and other textiles industries. Their combined weight in the total index is 22.3 per cent.

Table 3 Production of man-made fibres

Million kilogrammes

	1971	1972	1973	1974	1975	1976	1977	1976 1st qtr	1976 2nd qtr	1976 3rd qtr	1976 4th qtr	1977 1st qtr	1977 2nd qtr	1977 3rd qtr	1977 4th qtr	Growth rate per cent per annum 1971/77	Growth per cent 12 months ended Q4 1977/ Q4 1976
Staple fibre																	
Synthetic	166	177	221	196	178	214	182	52	53	52	57	53	51	42	36	+1.5	−15.0
Viscose and acetate	170	185	204	160	138	134	130	38	35	26	35	34	36	34	26	−4.4	−3.0
Total	336	362	425	356	316	348	312	90	88	78	92	87	87	76	62	−1.2	−10.3
Continuous filament yarn																	
Synthetic	191	196	233	200	185	200	177	52	52	46	50	49	48	41	39	−1.3	−11.5
Viscose and acetate	85	68	73	72	63	71	62	18	18	16	19	18	16	14	14	−5.1	−12.7
Total	276	264	306	272	248	271	239	70	70	62	69	67	64	55	53	−2.4	−11.8
All man-made fibres																	
Synthetic	357	373	454	396	363	414	359	104	105	98	107	102	99	83	75	+0.1	−13.3
Viscose and acetate	255	253	277	232	201	205	192	56	53	42	54	52	52	48	40	−4.6	−6.3
Total	612	626	731	628	564	619	551	160	158	140	161	154	151	131	115	−1.7	−11.0

Table 4 Consumption of fibres

Million kilogrammes

	1971	1972	1973	1974	1975	1976	1977	1976 1st qtr	1976 2nd qtr	1976 3rd qtr	1976 4th qtr	1977 1st qtr	1977 2nd qtr	1977 3rd qtr	1977 4th qtr	Growth rate per cent per annum 1971/77	Growth per cent 12 months ended Q4 1977/ Q4 1976
In cotton spinning																	
Raw cotton	140	129	126	111	103	113	104	30	27	27	29	31	25	23	25	−4.8	−8.0
Man-made staple fibre																	
Rayon	34	32	36	39	30	27	30	7	7	6	7	9	8	6	7	−2.1	+11.1
Other	36	34	37	30	30	38	39	10	9	9	10	11	9	9	10	+1.3	+ 2.6
In top making, wool spinning and felting																	
Wool and animal hair	151	165	149	121	122	134	126	35	34	31	34	36	33	27	30	−3.0	−6.0
Man-made staple fibre	77	86	105	103	86	87	85	22	23	19	23	23	22	19	21	+1.7	−2.3

Table 5 Prices

Index numbers 1970 = 100

	1971	1972	1973	1974	1975	1976	1977	1976 1st qtr	1976 2nd qtr	1976 3rd qtr	1976 4th qtr	1977 1st qtr	1977 2nd qtr	1977 3rd qtr	1977 4th qtr
Output (home sales)															
All manufactured products	109.0	114.8	123.2	152.0	188.7	219.6	261.7	206.9	214.4	223.2	223.9	248.0	259.1	267.7	272.1
Textile industries	104.9	112.2	131.7	162.2	178.6	205.9	242.2	193.0	201.1	209.6	219.9	234.9	241.6	244.7	247.5
Man-made fibre cloth	106.8	114.8	132.7	172.6	195.0	212.6	238.9	207.1	209.1	213.9	220.2	231.3	237.1	242.2	245.1
Cotton cloth	108.0	117.4	138.9	193.8	190.2	229.1	266.4	205.1	220.5	239.6	251.2	263.7	272.1	268.3	261.4
Worsted cloth	103.9	118.0	173.3	189.8	203.2	240.7	284.9	219.4	234.9	243.7	264.6	279.4	283.9	285.9	290.3
Socks, stockings and tights (inc. pantihose)	100.9	102.3	107.1	119.4	134.2	146.4	165.0	142.5	145.0	148.2	149.7	158.7	161.8	168.0	171.3
Knitted underwear and nightwear	104.2	111.1	126.8	154.7	178.5	206.6	254.3	190.3	201.3	210.0	224.7	248.6	250.5	254.8	263.6
Knitted outerwear	101.5	105.3	119.0	140.8	157.8	172.3	213.2	166.8	170.9	174.3	177.3	203.9	212.1	216.3	220.4
Carpets	104.9	111.7	130.2	153.1	177.8	211.3	249.8	200.2	206.6	214.5	224.0	239.3	249.6	252.3	257.7
Made-up clothing	106.4	112.3	119.4	138.3	159.4	178.5	201.1	172.0	175.1	179.4	187.8	194.8	197.6	203.3	208.6
Materials and fuel purchased															
Textile industries	104.8	119.0	166.7	189.9	201.7	265.6	293.2	232.4	255.9	275.1	298.6	298.8	297.1	290.3	286.9
Commodities wholly or mainly imported															
Raw cotton	112.9	116.6	204.2	229.5	196.9	356.7	338.1	264.6	324.4	405.7	432.3	397.7	377.8	305.2	271.8
Raw wool	94.9	156.3	332.3	250.3	210.7	303.7	332.0	250.4	286.1	313.9	364.4	350.8	333.8	325.5	317.7
Man-made fibres	103.1	103.6	105.8	137.9	156.9	175.4	197.8	166.9	173.4	176.8	184.7	194.2	198.3	198.4	200.2

fourth quarters and the price of cotton cloth fell for the second successive quarter.

Employment (table 6)
Total employment in Great Britain at mid-December in textiles was 4000 lower than in September 1977 and 11 000 lower than a year previously. The largest falls in employment between September and December 1977 occurred in the man-made fibres and woollen worsted sectors. Only hosiery and knitwear and textile finishing showed a marginal increase during that period. Despite the encouraging output performance, employment in the clothing industry declined by 2000 during 1977. All the textile and clothing industries continue to be substantial beneficiaries of the temporary employment subsidy.

Overseas trade (tables 7 to 10)
At £9½ million the crude trade deficit for clothing in the fourth quarter of 1977 was the lowest recorded in any quarter for several years. The value of imports was only slightly higher than in the final quarter of 1976, whereas the value of exports increased by 33 per cent. In 1977 as a whole imports registered a 12 per cent increase (in current prices) on 1976 while exports increased by 45 per cent to reach a level 125 per cent higher than in 1975. As in 1976, 45 per cent of total clothing exports went to EEC destinations. Exports of made-up clothing to West Germany, the Netherlands, Norway, Denmark and France, among the more important

Table 6 Employment in textiles [1]

Thousands

	MLH	1976 March	1976 June	1976 September	1976 December	1977 March	1977 June	1977 September	1977 December
Great Britain									
Textiles	411-429	477.5	479.7	481.7	485.8	483.6	484.4	478.5	474.7
Production of man-made fibres	411	34.5	34.1	34.1	33.9	33.0	32.6	32.1	31.1
Spinning and doubling on the cotton and flax systems	412	50.7	51.2	51.8	51.7	51.4	51.0	49.7	49.3
Weaving of cotton, linen and man-made fibres	413	40.3	40.0	40.2	39.7	39.9	39.5	39.2	38.8
Woollen and worsted	414	82.4	81.6	81.1	81.6	81.4	82.2	81.9	80.3
Hosiery and other knitted goods	417	111.6	113.8	114.9	116.1	116.4	119.1	117.7	118.2
Carpets	419	36.0	35.6	35.3	35.4	35.3	34.7	33.8	33.4
Textile finishing	423	45.6	46.2	46.8	47.4	47.1	46.8	46.4	46.8
Clothing	441-449	291.7	290.6	291.8	295.2	294.9	297.1	293.6	292.9

[1] Employees in employment at middle of each month.

Table 7 Crude trade balance [1]

£ million at current prices

	1971	1972	1973	1974	1975	1976	1977	1976 1st qtr	1976 2nd qtr	1976 3rd qtr	1976 4th qtr	1977 1st qtr	1977 2nd qtr	1977 3rd qtr	1977 4th qtr
Textile fibres (division 26)															
Exports	87.3	108.1	172.1	201.8	183.5	260.6	308.2	57.6	64.8	59.8	78.4	92.6	81.6	67.9	66.1
Imports	150.0	213.7	322.4	310.5	263.4	438.3	467.3	101.2	113.7	103.1	120.3	140.6	127.5	95.0	104.2
Balance	−62.7	−105.6	−150.3	−108.7	−79.9	−177.7	−159.1	−43.6	−48.9	−43.3	−41.9	−48.0	−45.9	−27.1	−38.1
Textile yarns, fabrics, etc (division 65)															
Exports	425.8	445.4	589.5	745.8	698.2	934.2	1 147.0	203.4	230.9	225.3	274.6	287.7	292.2	280.5	286.6
Imports	324.9	369.7	514.9	688.2	682.8	911.4	1 118.7	212.7	225.3	213.7	259.7	288.9	274.8	270.2	284.8
Balance	+100.9	+75.7	+74.6	+57.6	+15.4	+22.8	+28.3	−9.3	+5.6	+11.6	+14.9	−1.2	+17.4	+10.3	+1.8
Clothing (division 84)															
Exports	129.5	144.3	179.6	230.0	265.5	412.3	598.0	74.1	87.7	115.4	135.1	119.2	126.9	172.8	179.1
Imports	178.2	218.8	333.6	402.4	505.1	683.8	766.6	158.3	166.4	176.3	182.8	201.5	177.0	199.5	188.6
Balance	−48.7	−74.5	−154.0	−172.4	−239.6	−271.5	−168.6	−84.2	−78.7	−60.9	−47.7	−82.3	−50.1	−26.7	−9.5

[1] Imports cif, exports fob.

Table 8 Imports

£ million at current prices (cif)

	Textile fibres (div. 26)			Textile yarns, fabrics and made-up articles (div. 65)											Clothing (div. 84)			
	Man-made fibres, tow and waste (266)	Wool tops (262.7 part and 262.8)	Total textile fibres	Woollen and worsted yarns (651.2)	Cotton yarns and thread (651.3 and .4)	Continuous filament yarns (part 651.6 and 651.7)	Spun man-made fibre yarns (part 651.6 and 651.7)	Cotton woven fabrics (652)	Woollen and worsted woven fabrics (653.2)	Man-made fibre woven fabrics (653.5 and .6)	Knitted fabrics (653.7)	Carpets (657.6)	Total yarns, fabrics etc	Made-up clothing (841.1 and .2)	Hosiery and knitted garments (part [1] 841.4)	Total clothing
1971	16.9	2.8	150.0	4.1	10.2	54.2	7.3	70.4	7.9	57.1	16.6	12.2	324.9	99.6	68.8	178.2
1972	24.9	4.3	213.7	6.3	12.5	52.8	9.2	74.2	8.2	78.6	14.0	15.8	369.7	123.7	82.7	218.8
1973	35.4	5.3	322.4	11.0	15.5	70.7	17.0	103.5	11.8	115.3	12.7	21.3	514.9	197.8	112.3	333.6
1974	57.2	4.8	310.5	9.5	42.8	105.2	30.2	130.5	13.5	154.5	16.4	23.0	688.2	243.9	134.1	402.4
1975	45.5	3.8	263.4	11.1	28.3	92.2	28.7	125.7	16.6	167.2	18.5	27.4	682.8	307.5	166.7	505.1
1976	59.3	4.2	438.3	17.1	41.8	127.5	41.2	190.7	19.1	196.4	22.8	36.7	911.4	404.1	238.4	683.8
1977	71.0	6.8	467.3	22.7	54.7	154.0	49.3	219.2	31.2	259.3	24.3	46.0	1 118.7	437.8	272.8	766.6
1975																
1st qtr	10.4	1.0	56.1	2.2	6.6	20.7	5.9	31.7	3.2	44.5	3.6	5.9	166.8	68.0	37.2	111.0
2nd	10.8	0.8	74.2	3.0	6.8	20.6	6.8	29.8	5.0	41.4	4.3	6.7	166.0	79.4	39.5	125.1
3rd	12.1	1.1	70.4	2.8	7.0	24.9	7.0	30.1	5.0	39.9	5.4	6.7	167.4	75.7	45.9	130.7
4th	12.2	0.9	62.7	3.1	7.9	26.0	9.0	34.1	3.4	41.4	5.2	8.0	182.6	84.4	44.1	138.3
1976																
1st qtr	14.5	0.9	101.2	3.6	9.5	29.4	9.8	43.6	4.0	47.6	4.6	8.2	212.7	97.9	52.5	158.3
2nd	14.7	1.1	113.7	4.2	9.0	31.4	10.6	53.0	4.7	43.7	5.4	8.8	225.3	104.3	53.2	166.4
3rd	15.4	1.0	103.1	4.2	9.2	30.0	9.3	44.6	5.1	47.2	6.0	8.5	213.7	100.2	64.1	176.3
4th	14.7	1.2	120.3	5.1	14.1	36.7	11.5	49.5	5.3	57.9	6.8	11.3	259.7	101.7	68.6	182.8
1977																
1st qtr	19.0	1.2	40.6	5.8	14.8	40.1	11.6	57.9	6.2	67.0	6.6	10.0	288.9	117.7	71.0	201.5
2nd	19.0	1.6	127.5	5.4	14.7	37.9	12.0	57.0	8.1	56.8	5.9	10.8	274.8	102.5	62.0	177.0
3rd	15.4	1.8	95.0	5.5	12.6	36.3	11.2	52.4	8.7	66.8	5.4	11.1	270.2	110.7	73.1	199.5
4th	17.6	2.2	104.2	6.0	12.6	39.7	14.5	51.9	8.2	68.7	6.4	14.1	284.8	106.9	66.7	188.6

[1] Less 841.45.
Source: Overseas trade statistics.

Table 9 Exports

£ million at current prices (fob)

	Textile fibres (div. 26)			Textile yarns, fabrics and made-up articles (div. 65)											Clothing (div. 84)		
	Man-made fibres, tow and waste (266)	Wool tops (262.7 part and 262.8)	Total textile fibres	Woollen and worsted yarns (651.2)	Cotton yarns and thread (651.3 and .4)	Continuous filament yarns (part 651.6 and 651.7)	Spun man-made fibre yarns (part 651.6 and 651.7)	Cotton woven fabrics (652)	Woollen and worsted woven fabrics (653.2)	Man-made fibre woven fabrics (653.5 and .6)	Knitted fabrics (653.7)	Carpets (657.6)	Total yarns, fabrics etc	Made-up clothing (841.1 and .2)	Hosiery and knitted garments (part [1] 841.4)	Total clothing
1971	45.5	16.3	87.3	23.3	10.1	80.4	9.6	28.6	62.8	31.6	54.4	34.2	425.8	61.8	49.0	129.5
1972	56.5	19.8	108.1	27.3	11.7	83.8	10.9	29.0	66.9	37.4	43.2	40.7	445.4	70.2	53.5	144.3
1973	77.7	38.1	172.1	37.0	17.0	110.0	18.6	39.5	91.5	49.9	43.1	63.0	589.5	86.9	68.0	179.6
1974	118.7	26.2	201.8	41.6	22.0	136.5	28.1	52.0	106.6	68.6	44.9	85.0	745.8	113.4	81.8	230.0
1975	101.3	28.6	183.5	37.5	18.5	112.8	23.3	46.9	92.5	68.2	44.3	74.6	698.2	137.1	89.3	265.5
1976	124.0	50.5	260.6	56.0	26.8	157.8	33.3	72.0	105.2	90.5	51.7	113.0	934.2	210.6	147.8	412.3
1977	153.2	56.9	308.2	77.5	27.3	174.5	36.1	94.4	151.4	112.0	56.9	141.5	1 147.0	320.9	215.8	598.0
1975																
1st qtr	26.2	5.2	43.2	8.3	4.6	26.9	5.9	12.1	21.9	17.6	8.2	16.9	165.1	27.0	17.2	52.5
2nd	32.1	7.0	52.1	9.4	4.4	28.0	5.9	10.7	24.4	16.7	11.8	17.5	174.5	29.8	16.8	54.8
3rd	21.4	8.0	41.3	8.7	3.9	25.8	4.6	11.2	23.8	15.0	11.4	16.3	161.4	37.9	26.8	75.2
4th	21.6	8.4	46.9	11.1	5.6	32.1	6.9	12.9	22.4	18.9	12.9	23.9	197.2	42.4	28.5	83.0
1976																
1st qtr	26.9	11.0	57.6	11.1	5.3	35.4	7.7	16.1	19.7	20.6	10.9	24.4	203.4	37.8	25.3	74.1
2nd	30.3	13.4	64.8	13.7	6.8	39.4	8.5	16.6	27.6	22.2	12.5	27.3	230.9	48.2	28.5	87.7
3rd	29.1	11.6	59.8	13.6	6.8	38.9	7.1	15.8	28.5	21.0	13.6	26.0	225.3	58.3	42.8	115.4
4th	37.7	14.5	78.4	17.6	7.9	44.1	10.0	23.5	29.4	26.7	14.7	35.3	274.6	66.3	51.2	135.1
1977																
1st qtr	46.1	18.0	92.6	20.0	7.1	45.7	10.3	24.2	31.2	28.4	13.8	37.4	287.7	65.2	40.6	119.2
2nd	40.2	15.8	81.6	19.9	7.7	47.5	9.5	22.1	37.5	29.3	14.1	36.4	292.2	72.5	41.0	126.9
3rd	35.6	11.7	67.9	17.8	6.1	40.9	7.2	23.3	42.9	27.0	14.0	33.4	280.5	89.8	65.5	172.8
4th	31.3	11.4	66.1	19.8	6.4	40.4	9.1	24.8	39.8	27.3	15.0	34.3	286.6	93.4	68.7	179.1

[1] Less 841.45.
Source: Overseas trade statistics.

markets, all showed increases in value of over 60 per cent, as did exports of knitwear to the USA and the Netherlands.

In yarns and fabrics (div 65) the crude trade balance was only marginally in the UK's favour in the fourth quarter. The value of imports rose to just below the peak which occurred in the first quarter, whereas the value of exports remained fairly constant throughout 1977, although declining in terms of volume. In 1977 as a whole imports and exports were both 23 per cent higher than in 1976, leaving the crude trade balance slightly more favourable at £28 million. The proportion of exports going to EEC countries rose from 38 per cent in 1976 to 39½ per cent in 1977. Woollen and worsted yarns (38 per cent) and fabrics (44 per cent) showed the largest increases in value, with exports of yarns to the Irish Republic and fabrics to the USA and Kuwait all rising by more than 70 per cent.

Inquiries: 01-212 6787.

Table 10 Imports of raw materials

£ million at current prices (cif)

	Greasy wool (262.1)		Degreased wool (262.2)		Fine animal hair (262.3)		Raw cotton (263.1)	
	mn kg	£m	mn kg	£m	mn kg	£m	mn kg	£m
1971	99	33	62	21	9	5	142	41
1972	130	56	77	23	18	13	137	44
1973	95	93	56	55	15	28	171	66
1974	65	67	56	48	9	21	93	61
1975	84	58	48	37	11	22	113	59
1976	112	121	50	54	15	50	122	95
1977	101	124	37	52	11	48	104	106
1975								
1st qtr	19	13	8	6	2	3	23	11
2nd	29	19	16	12	3	6	32	16
3rd	20	14	15	12	3	6	32	17 [1]
4th	16	12	9	7	3	7	26	15
1976								
1st qtr	35	32	10	10	3	8	38	23
2nd	28	28	17	17	5	14	34	25
3rd	24	27	13	15	3	10	26	22
4th	25	34	10	12	4	18	24	25
1977								
1st qtr	29	40	11	16	2	10	33	37
2nd	27	32	13	18	3	13	25	27
3rd	25	27	6	9	2	10	18	19
4th	20	25	7	9	4	15	28	23

[1] w
Source: Overseas trade statistics.

New companies registered in Northern Ireland: January and February

The number of new companies registered in Northern Ireland in January and February 1978 and the total nominal capital are as follows:

	January 1978	January 1977	February 1977	January to 28 February 1978
Public companies limited by shares	—	—	—	—
Private companies limited by shares	72	53	68	136
Private unlimited companies	—	—	—	—
Public companies limited by guarantee not having a share capital	—	—	2	—
Private companies limited by guarantee not having a share capital	—	1	—	—
Private companies limited by guarantee having a share capital	—	—	—	—
Total nominal capital of companies incorporated	£4 325 808	£2 238 600	£2 673 004	£6 681 226

Inquiries: Belfast 34121.

Manufacturers' stocks in January

It is estimated that manufacturers' stocks fell by about £20 million at 1970 prices, seasonally adjusted, in January 1978. A fall in stocks of finished goods was partially offset by a rise in work in progress, while stocks of materials and fuel are not thought to have changed. Monthly figures below are adjusted to agree with the quarterly figures published last week.

Stock changes: £ million, 1970 prices, seasonally adjusted

1977	July	—
	August	−30
	September	—
	October	+20
	November	−60
	December	—
1978	January	−20

Inquiries: 01-215 3176/5345/5215.

Cost indices for the aerospace and radio, radar and electronic capital goods industries

January's figures are given below. Attention is drawn to the footnotes: an explanation of the compilation of the indices was given in the introductory article in *Trade and Industry* on 3 February.

Cost indices for the aerospace and radio, radar and electronic capital goods industries (MLH 383 and 367 respectively)

1970 = 100

	1977												1978
	Jan	Feb	Mar	Apr	May p	Jun p	Jul p	Aug p	Sep p	Oct p	Nov p	Dec p	Jan p
1 BOUGHT OUT FINISHED GOODS													
Aerospace industry	250.0	251.6	254.6	256.1	259.1	259.2	261.7	261.9	264.0	267.6	272.2	273.1	275.5
Airframe sector	245.9	247.5	250.6	251.9	254.9	255.0	257.5	258.2	259.8	263.5	267.9	268.8	271.4
Aero-engine and aero-engine parts sector	253.1	254.7	257.7	259.2	262.2	262.5	265.1	265.2	267.6	270.9	275.4	276.6	279.1
Aero-engine parts sector	247.2	249.1	252.2	254.0	256.6	257.3	260.3	262.2	263.8	267.5	270.7	272.5	276.2
Aircraft component sector	255.3	256.9	260.0	261.4	264.3	264.4	267.0	266.8	269.1	272.2	276.4	277.4	279.2
2 OTHER PURCHASED MATERIALS													
Aerospace industry	304.5	307.2	309.9	309.9	310.2	309.9	313.5	315.2	318.3	319.8	317.3	317.1	316.6
Airframe sector	283.0	285.9	289.1	289.9	290.7	292.0	297.3	301.2	303.4	304.8	302.9	303.6	304.0
Aero-engine and aero-engine parts sector	300.4	303.8	305.0	305.0	305.1	304.9	307.9	310.2	315.6	318.9	317.6	317.5	319.3
Aero-engine parts sector	324.1	326.5	329.0	328.6	328.8	327.6	330.3	330.5	333.8	335.2	332.2	331.3	330.0
Aircraft components sector	314.2	316.7	320.0	319.6	319.8	318.9	322.2	322.7	324.0	324.3	320.8	320.4	317.9
3 ALL PURCHASES OF GOODS													
Aerospace industry	268.0	269.9	272.9	273.8	275.9	276.0	278.8	279.5	282.0	284.8	287.1	287.7	289.1
Airframe sector	254.4	256.3	259.4	260.7	263.1	263.5	266.6	268.1	269.8	273.0	275.9	275.8	278.9
Aero-engine and aero-engine parts sector	270.1	272.1	274.7	275.7	277.6	277.8	280.5	281.3	284.8	288.2	290.5	291.3	293.5
Aero-engine parts sector	278.3	280.4	283.3	284.2	285.8	285.8	288.6	289.8	292.1	294.9	295.6	296.3	298.0
Aircraft components sector	290.0	292.1	295.3	295.7	297.0	296.5	299.5	299.7	301.5	302.9	302.5	302.7	302.0
Radio, radar and electronic capital goods industry	243.8	246.8	250.4	252.5	256.5	257.1	259.6	260.8	262.1	265.2	268.2	268.2	270.5
4 SALARIES AND GENERAL EXPENSES													
Aerospace industry	245.3	245.8	248.0	249.7	253.7	253.7	255.6	253.8	256.2	259.6	265.4	266.4	267.9
Airframe sector	243.8	244.1	246.3	247.8	252.0	251.8	253.6	251.6	254.2	257.7	264.0	265.1	266.5
Aero-engine and aero-engine parts sector	250.8	251.3	253.3	255.2	259.3	259.3	261.1	259.5	261.9	265.1	270.6	271.6	273.1
Aero-engine parts sector	243.2	244.1	246.3	248.2	252.1	252.4	254.4	253.0	255.4	258.6	264.1	265.1	266.7
Aircraft components sector	240.4	240.8	243.0	244.6	248.5	248.4	250.2	248.3	250.7	254.1	260.1	261.1	262.4
Radio, radar and electronic capital goods industry	225.8	226.5	229.5	230.1	234.1	233.6	235.4	233.0	235.5	239.0	245.5	246.5	247.5
5 HOURLY EARNINGS OF ADULT MANUAL WORKERS													
Aerospace industry	250.8	251.3	254.5	254.2	258.3	257.2	259.0	256.0	258.9	262.9	272.3	273.6	274.7
Radio, radar and electronic capital goods industry	270.1	271.3	276.9	276.7	278.4	276.0	277.3	279.3	279.4	288.3	302.0	294.4	297.6
6 COMBINED COSTS													
Aerospace industry	255.5	256.5	259.2	260.2	263.5	263.2	265.4	264.4	266.9	270.2	275.5	276.4	277.7
Airframe sector	249.2	250.1	252.9	253.8	257.4	257.2	259.5	258.5	260.9	264.4	270.2	271.2	272.8
Aero-engine and aero-engine parts sector	258.0	259.1	261.6	262.6	265.9	265.7	267.8	266.8	269.8	273.2	278.5	279.5	281.1
Aero-engine parts sector	256.1	257.2	259.9	260.8	264.1	263.9	266.0	264.9	267.4	270.8	276.1	277.1	278.6
Aircraft components sector	258.9	259.8	262.6	263.2	266.4	265.9	268.0	266.4	268.8	271.8	277.0	277.8	278.4
Radio, radar and electronic capital goods industry	241.5	243.4	247.0	248.2	251.8	251.6	253.6	253.5	255.1	259.3	265.4	264.5	266.5

Definitive information on earnings for both manual and administrative, technical and clerical (ATC) workers is available only for certain months of the year – manual earnings information is available for MLH 383 for April and October but for MLH 367 in respect of October only; ATC salaries information for both industries is available for April of each year.

The indices of combined costs are based on the assumption of no change in productivity.

Revisions to series brought about as a result of ATC salaries information becoming available will be shown in the article to be published on 8 December and will affect indices from May the preceding year up to and including those of August.

Revisions to series incorporated as a result of manual earnings information from the October survey are published in this article and these affect series from the preceding November up to and including December. The results obtained from the April aerospace survey will affect indices from the preceding November up to and including June and will be shown in the article published on 6 October.

The cost index tables previously D1-D5 and D7 have now been redesignated sections 1 to 6 in the table.

p Provisional.

Cost indices for the aerospace and radio, radar and electronic capital goods industries: revisions to previously published figures

1970 = 100

	1976	
	Nov	Dec
1 BOUGHT OUT FINISHED GOODS		
Aerospace industry	245.1	246.5
Airframe sector	240.9	242.5
Aero-engine and aero-engine parts sector	248.1	249.4
Aero-engine parts sector	241.0	243.1
Aircraft component sector	250.4	251.5
2 OTHER PURCHASED MATERIALS		
Aerospace industry	299.6	299.3
Airframe sector	277.1	278.6
Aero-engine and aero-engine parts sector	295.9	295.6
Aero-engine parts sector	319.6	318.0
Aircraft components sector	309.2	308.2
3 ALL PURCHASES OF GOODS		
Aerospace industry	263.1	263.9
Airframe sector	249.2	250.8
Aero-engine and aero-engine parts sector	265.3	266.0
Aero-engine parts sector	272.8	273.4
Aircraft components sector	285.0	284.9
Radio, radar and electronic capital goods industry	238.0	239.6

	1976	
	Nov	Dec
4 SALARIES AND GENERAL EXPENSES		
Aerospace industry	240.8	242.1
Airframe sector	239.6	240.8
Aero-engine and aero-engine parts sector	245.5	247.0
Aero-engine parts sector	238.6	239.9
Aircraft components sector	236.4	237.5
Radio, radar and electronic capital goods industry	223.1	224.2
5 HOURLY EARNINGS OF ADULT MANUAL WORKERS		
Aerospace industry	248.9	249.7
Radio, radar and electronic capital goods industry	269.2	271.1
6 COMBINED COSTS		
Aerospace industry	251.4	252.4
Airframe sector	245.2	246.4
Aero-engine and aero-engine parts sector	253.7	254.8
Aero-engine parts sector	252.1	253.0
Aircraft components sector	255.2	255.9
Radio, radar and electronic capital goods industry	237.7	239.1

Inquiries: 01-215 3514.

Gross domestic product: slight increase

Latest estimates of gross domestic product for periods up to the end of 1977 suggest that there has been little change for the last year. The output measure, usually considered the best measure of short-term movements, increased by about ½ per cent between the third and fourth quarters and is only a little higher than its value a year ago. The increase was concentrated in the services sector, with falls in manufacturing output.

Between the first and second halves of 1977 the average measure of GDP increased very slightly. Consumers' expenditure increased in the last two quarters of the year following declines in the previous half-year and imports were falling throughout the year. However, fixed investment fell a little in the third and fourth quarters and exports, having grown through the middle of the year, fell back in the fourth quarter.

Office development permits: fourth quarter and the year 1977

The Department of the Environment reports that considerably fewer office development permits were issued in 1977 than in 1976. This can be explained partly by the increase in the exemption limit from 15 000 sq ft to 30 000 sq ft, effective from 14 June 1977. The total area covered by the permits issued was, however, only slightly less than in 1976.

Fourth quarter 1977

In the fourth quarter of 1977, the number of permits issued rose to 45 compared with 31 in the previous quarter. The floor space covered by these permits rose from 3.0 million sq ft to 4.7 million sq ft. In the fourth quarter of 1976, 52 permits covering 3.7 million sq ft were issued. Applicants for permits issued in the fourth quarter of 1977 stated that 44 000 sq ft of the floor space applied for would be offset by relinquishments (ie demolition of existing offices or conversions to non-office use). If permits for continuing use of existing offices are also deducted, the net potential addition to office floor space in the fourth quarter was 3.1 million sq ft compared with 1.5 million sq ft in the fourth quarter of 1976 and a quarterly average of 2.3 million sq ft for 1977 as a whole.

Annual comparison

The total area of the 165 permits issued in 1977 was 14.1 million sq ft compared with 261 permits covering 14.4 million sq ft in 1976, while the average area of floor space per permit rose from 55.3 thousand sq ft in 1976 to 85.3 thousand sq ft in 1977. Included in the 1977 total were 43 permits with a floor space of 4.5 million sq ft issued for continuing use as offices. Comparable 1976 figures for this category were 79 permits with a floor area of 5.6 million sq ft.

Of the total floor space covered by permits issued in 1977, 0.6 million sq ft or 4 per cent was claimed by applicants to be offset by space relinquished for demolition or change from office to non-office use. This compares with 10 per cent in 1976 and 8 per cent in 1975.

During 1977, 57 permits issued for central London accounted for 5.7 million sq ft or 40 per cent of the south east total: 6 per cent of this floor space was offset by relinquishments. Comparable figures for the whole of Greater London were 110 permits for 10.9 million sq ft (77 per cent of the total with 5 per cent

Table 1 Office development permits: sub-divisions of south east planning region

	Central London			Rest of Greater London			Total Greater London			Metropolitan region (excluding Greater London)			Total Metropolitan region			South east (excluding Metropolitan region)			Total south east		
		Thousand sq ft			Thousand sq ft			Thousand sq ft			Thousand sq ft			Thousand sq ft			Thousand sq ft			Thousand sq ft	
	No.	Gross	Relinquished	No.	Gross	Relinquished	No.	Gross	Relinquished	No.	Gross	Relinquished	No.	Gross	Relinquished	No.	Gross	Relinquished	No.	Gross	Relinquished
1975	64	4 883	448	106	5 414	442	170	10 297	890	86	2 258	51	256	12 555	941	46	1 319	113	302	13 874	1 054
1976	75	6 545	1 119	82	3 376	155	157	9 921	1 274	66	2 714	71	223	12 635	1 345	38	1 791	71	261	14 426	1 416
1977	57	5 674	328	53	5 210	224	110	10 884	552	36	1 960	37	146	12 844	589	19	1 226	10	165	14 070	599
1976																					
1st qtr	19	1 682	449	20	687	67	39	2 369	516	27	1 053	45	66	3 422	561	13	627	3	79	4 049	564
2nd	15	957	112	23	958	82	38	1 915	194	19	871	6	57	2 786	200	12	408	—	69	3 194	200
3rd	21	1 893	311	22	935	1	43	2 828	312	12	376	16	55	3 204	328	6	325	68	61	3 529	396
4th	20	2 013	247	17	796	5	37	2 809	252	8	414	4	45	3 223	256	7	431	—	52	3 654	256
1977																					
1st qtr	13	798	100	14	1 404	19	27	2 202	119	17	731	2	44	2 933	121	6	429	—	50	3 362	121
2nd	13	1 397	56	13	938	43	26	2 335	99	5	184	17	31	2 519	116	8	480	—	39	2 999	116
3rd	12	1 248	164	12	1 342	140	24	2 590	304	5	268	14	29	2 858	318	2	162	—	31	3 020	318
4th	19	2 231	8	14	1 526	22	33	3 757	30	9	777	4	42	4 534	34	3	155	10	45	4 689	44

Notes to table

Application of controls. Control was applied to the Metropolitan Region (Greater London and part of the south east region) from 5 August 1965, but with retrospective application to 5 November 1964 for some projects and to the west Midland conurbation from 14 August 1965. In July 1966 control was extended to the remainder of the south east and west Midland regions and to the whole of the east Midland and East Anglia regions. In February 1969 East Anglia and rural parts of the Midlands were excluded and since December 1970 control has applied only to the south east region.

Modifications to controls. On 14 June 1977 the exemption limit for permits throughout the south east region was raised from 15 000 to 30 000 sq ft. Office development permits are not required for offices ancillary to industrial development covered by an appropriate industrial development certificate.

Definition of areas

See *Trade and Industry*, 2 September 1977, page 432.

Area relinquished. Comprises office floor space relinquished for demolition or change of use to non-office uses.

Table 2 Size analysis of permits

Thousand sq ft	1973		1974		1975		1976		1977	
	Number	Gross area	Number	Gross area	Number	Gross area	Number	Gross area	Number	Gross area
Total south east planning region										
Up to 10	44	236	31	177	56	250	46	239	9	52
11-20	119	1 807	63	985	85	1 269	53	854	13	212
21-50	180	5 825	78	2 599	96	3 057	86	2 624	52	1 783
Over 50	134	18 026	54	8 149	65	9 298	76	10 709	91	12 023
Total	477	25 894	226	11 910	302	13 874	261	14 426	165	14 070
Average area per permit		54.3		52.7		45.9		55.3		85.3
Greater London										
Up to 10	27	145	14	91	25	106	23	108	6	35
11-20	61	909	39	609	49	762	32	510	5	77
21-50	96	3 061	44	1 452	46	1 518	48	1 450	35	1 195
Over 50	79	11 563	26	4 986	50	7 911	54	7 853	64	9 577
Total	263	15 678	123	7 138	170	10 297	157	9 921	110	10 884
Average area per permit		59.6		58.0		60.6		63.2		98.9
South east (excluding Greater London)										
Up to 10	17	91	17	86	31	144	23	131	3	17
11-20	58	898	24	376	36	507	21	344	8	135
21-50	84	2 764	34	1 147	50	1 539	38	1 174	17	588
Over 50	55	6 463	28	3 163	15	1 387	22	2 856	27	2 446
Total	214	10 216	103	4 772	132	3 577	104	4 505	55	3 186
Average area per permit		47.7		46.3		27.1		43.3		57.9

relinquishments), and for the whole of the Metropolitan region, 146 permits for 12.8 million sq ft (91 per cent of the total with 5 per cent relinquishments).

Size of permits

Table 2 gives the distribution by size of permits issued. Permits are required for developments below the exemption limit if there have been previous related developments.

Inquiries: 01-212 8563.

Films Act 1960: combination of quota periods

'Close Encounters of the Third Kind'

The Department of Trade, after consulting the Cinematograph Films Council and upon the application of EMI Cinemas Ltd, has issued a direction that for the following cinemas the years 1978 and 1979 may be combined as a single quota period, provided that the foreign film 'Close Encounters of the Third Kind' is exhibited for a continuous period of at least eight weeks and one day: ABC1, Oxford; ABC1, Swindon; ABC1, Cambridge; ABC1, Gloucester; ABC1, Mansfield; and ABC1, Staines.

'Star Wars'

The Department of Trade, after consulting the Cinematograph Films Council and upon the application of Orr Enterprises Ltd, has issued a direction that the years 1978 and 1979 may be combined as a single quota period at the Theatre One, Screen 3, Coventry, provided that the foreign film 'Star Wars' is exhibited for a continuous period of at least eight weeks and one day.

Registrations of British, community and foreign films

The following are details of films registered by the Department of Trade under the Films Acts 1960 to 1970, as amended by the European Communities Act 1972, during the week ended Friday, 31 March 1978.

BR/E indicates that the film is a British quota film, EC that the film is a quota film. The date which forms part of the registration number of each is the date on which quota life of the film expires.

Title of film	Registered no.	Playing time minutes	Date of registration	Registered in the name of	Maker's name
BRITISH					
The Rise And Fall Of Ivor Dickie	BR/E 39524/2/4/83	42	29 March	New Realm Distributors Ltd	Marbaville Ltd
Adventures Of A Plumber's Mate	BR/E 39528/2/4/83	88	30 March	Alpha Films Ltd	Salon Productions Ltd
Review No. 8 (31st Year)	BR/E 39530/2/4/83	10	31 March	Data Film Distributors Ltd	The National Coal Board
Vintage Italiana	BR/E 39532/2/4/83	19	31 March	Columbia-Warner Distributors Ltd	Global Films Ltd and Queensway Promotions Ltd
Sabre 226	BR/E 39533/2/4/83	24	31 March	Columbia-Warner Distributors Ltd	Global Films Ltd and Queensway Promotions Ltd
Movietone News 2547	BR/E 39395/2/4/83	8	31 March	British Movietonews Ltd	British Movietonews Ltd
COMMUNITY					
Confessions Of Emanuelle	EC 39525/2/4/83	88	29 March	New Realm Distributors Ltd	Embassy Production SpA, Rome
The Man Who Loved Women	EC 39526/2/4/83	119	29 March	Gala Films Distributors Ltd	Les Films du Carrosse, Productions Artistes Associes and Andrea Films, Paris
FOREIGN					
Cain's Way	F 39527	88	30 March	Alpha Films Ltd	Manson International Inc, California
Master Of The Flying Guillotine	F 39529	77	31 March	Tigon Film Distributors Ltd	First Film Organisation Ltd, Kowloon
Through The Looking Glass	F 39531	75	31 March	Oppidan Entertainments Ltd	Miracle of Now Inc, New York
Bullet Train	F 39534	89	31 March	Mark Associates Ltd	TOEI Co Ltd, Tokyo

AMENDMENT TO THE REGISTER

The registration number of the film 'Swept Away', registered on 23 February has been amended to EC 39495/26/ 2/83.

NOTES

The quota life of the film 'Pornbrokers' (BR/E 37007/9/9/78) has been extended until 15 September 1979 by a direction under section 2(2a) of the Films Act 1960 as inserted by section 10(1) of the Films Act 1970.

The quota life of the film 'Bequest To A Village' (BR/E 35190) has been renewed in respect of the period 16 March 1978 until 22 March 1980, under section 2(2) of the Films Act 1960 as amended by section 10(1) of the Films Act 1970.

Index to statistics published regularly in 'Trade and Industry'

(a) annually (m) monthly (q) quarterly

Aerospace cost indices page 43
Air transport: trade by air (a) 1 Jul 77
Balance of payments
current account (m) 17 Mar 78
summary (q) 16 Dec 77
overseas royalties 12 Aug 77
trends in invisibles page 36
see also Overseas trade of the UK
Business names and limited partnerships (a) 10 Feb 78
Capital expenditure:
manufacturing, distributive and service industries (q) 31 Mar 78
provisional (q) 10 Mar 78
by regions 18 Feb 77
leasing, hiring and renting out (a) 30 Sept 77
see also Investment
Catering trades turnover (q) 17 Feb 78
Check trading (a) page 39
Chemicals industry activity (q) 6 Jan 78
Companies
acquisitions and mergers (q) 10 Feb 78
insolvencies (q) 3 Feb 78
liquidity (q) 10 Mar 78
new registrations:
Gt. Britain (m) 24 Mar 78
N. Ireland (m) page 42
rate of return on capital (a) 16 Sept 77
structure of company financing 3 Feb 78
Construction work overseas (a) 4 Nov 77
Earnings, wage rates (m) 24 Mar 78
Energy trends (m) 3 Mar 78
Engineering industries:
production indices (m) 31 Mar 78
sales and orders (m) 24 Mar 78
Film industry
British Film Fund Agency returns (m) 17 Mar 78
cinema admissions and takings (m) 31 Mar 78
annual inquiry (a) 30 Sept 77
exhibitors' quota returns (a) 6 May 77
overseas payments and earnings (a) 26 Aug 77
registrations of films (a) 3 Feb 78
Food
consumption levels (6m) 18 Nov 77
household consumption (q) 23 Dec 77
Footwear industry:
deliveries and stocks (m) 24 Mar 78
Foreign trade: industrial countries' economic indicators (m) page 33
quarterly analysis (q) 3 Mar 78
see also Overseas trade of the UK
Hire purchase business (m) page 38
Industrial production
index numbers (m) 24 Mar 78
Scotland (q) 10 Mar 78
Wales (q) 24 Feb 78
correction 3 Mar 78
Insurance companies:
investments and assets (a) 11 Nov 77
Investment
book values of overseas direct investments (every 3 years) 25 Feb 77
industry's investment intentions (3 times a year) 6 Jan 78
investment and earnings overseas (a) 5 Aug 77
see also Capital expenditure
Land and building sales (a) 24 Mar 78
Made-up clothing:
orders and deliveries (m) 17 Feb 78
Man-made fibres
deliveries (q) 10 Feb 78
production (m) 17 Mar 78
production: quarterly analysis (q) 10 Feb 78
Metal-working machine tools (m) 10 Mar 78
Motor industry
car and commercial vehicle production (m) 31 Mar 78
provisional (m) 17 Mar 78
motor trade turnover (q) 24 Feb 78
Office development permits (q) page 44
Official reserves (m) page 47
Overseas trade of the UK
direct exporters and credit terms (a) 12 Aug 77
analysis of trends (q) 10 Mar 78
export prospects (q) 10 Mar 78
invoicing in foreign currencies 22 Apr 77
see also Balance of payments
Pension funds: investments and assets (a) 11 Nov 77
Price Commission index (m) 17 Mar 78
Regional development grants (q) 10 Mar 78
Research and development expenditure 24 Jun 77 and 1 Jul 77
Retail prices index (m) 24 Mar 78
Retail trades
sales (m) page 37
provisional figures (m) 17 Mar 78
stocks (m) 17 Mar 78
Royalties: overseas transactions (a) 12 Aug 77
Selective financial assistance
section 7 (m) 3 Feb 78
section 7 £10,000 or more (q) 24 Feb 78
section 8 (q) 24 Feb 78
Shipping
nationality of vessels in UK seaborne trade (a) 9 Sept 77
UK revenue (a) 30 Sept 77
Steel: consumption and stocks (q) 31 Mar 78
provisional (q) 17 Feb 78
Stocks
manufacturers' and distributors' (q) 31 Mar 78
provisional (q) 3 Mar 78
manufacturers' (m) page 42
retail (m) 17 Mar 78
Television: overseas payments and earnings (a) 26 Aug 77
Textiles
activity in the industry (q) page 39
carpet sales (m) 17 Mar 78
cotton industry production (m) 24 Feb 78
hosiery production (m) 24 Feb 78
wholesale houses' sales and stocks (m) 17 Mar 78
wool exports (q) 17 Feb 78
wool output (m) 17 Mar 78
Tourism
foreign arrivals (m) 24 Feb 78
overseas travel and tourism (a) 29 Jul 77
overseas travel and tourism (q) 20 Jan 78
Unemployment (m) 31 Mar 78
Wholesale prices
average prices of selected commodities (a) 13 May 77
index numbers (m) 17 Mar 78
initial summary (m) 10 Mar 78

Organisational information

Commercial representation guide 28 Oct 77
ECGD local offices 12 Aug 77
ECGD lines of credit page 13
European public holiday guide 25 Nov 77
Government statistics guide 13 Jan 78
Guide to departments 27 Jan 78
Guide to schemes of selective financial assistance 7 Oct 77
Index, Oct-Dec This week
OTAR contact points centre pages
Release dates of economic statistics 24 Mar 78
Trade promotions guide 31 Mar 78

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403	413	423	433	443	453	463	473	483	493	503	513	523	533	543	553	563	573	583	593
404	414	424	434	444	454	464	474	484	494	504	514	524	534	544	554	564	574	584	594
405	415	425	435	445	455	465	475	485	495	505	515	525	535	545	555	565	575	585	595
406	416	426	436	446	456	466	476	486	496	506	516	526	536	546	556	566	576	586	596
407	417	427	437	447	457	467	477	487	497	507	517	527	537	547	557	567	577	587	597
408	418	428	438	448	458	468	478	488	498	508	518	528	538	548	558	568	578	588	598
409	419	429	439	449	459	469	479	489	499	509	519	529	539	549	559	569	579	589	599
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